



Urban League of
Rhode Island

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Changing Lives.*

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March 25, 2014

State of Rhode Island and Providence Plantations
Department of Education
Office of Charter Schools
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On behalf of the Rhode Island Urban League, we are honored to serve as the fiduciary sponsor and establishing entity for Ida Lewis Leadership Academy, a proposed charter school, which if approved by the Rhode Island Department of Education, would open its doors in August 2015 to students residing in Newport County. Founded in 1939, the Rhode Island Urban League is a community-based non-profit tax-exempt organization whose mission is to eliminate racial segregation and discrimination. The Rhode Island Urban League's Board of Trustees and the founders of Ida Lewis Leadership Academy share the same passion of seeking equality for Blacks, other minorities and the economically disadvantaged. Both organizations are committed to enabling those who are traditionally underserved to demonstrate their full potential as productive community members and leaders who leave behind a legacy. We both believe in the importance of empowering community members to make a positive impact on the world.

Belinda L. Francis
Interim CEO

Having thoroughly reviewed the attached charter school proposal, we are confident that there is a clear philosophical alignment between the Rhode Island Urban League and the Ida Lewis Leadership Academy. We are thus proud to affiliate with Ida Lewis Leadership Academy and excited about our ongoing synergistic partnership.

*Affiliated with
The National*

Urban League

Respectfully Submitted,

Belinda Francis
Interim Executive Director
Rhode Island Urban League

Wendy Randle
Executive Director
Ida Lewis Leadership Academy

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Rhode Island Charter Public Schools Statement of Intent Cover Sheet

Name of Proposed Charter School: Ida Lewis Leadership Academy

Proposed Location of School: Newport, RI

Proposed Sending District(s): Newport County (Newport, Middletown, Portsmouth, Little Compton, Tiverton & Jamestown)

Primary Contact: Wendy Randle

Proposed Role with Charter School: Executive Director

Address: 35 Abalone Road

City/State/ZIP: North Kingstown, RI 02874

Phone: (401)871-3878

Email: wrandle@paulcuffee.org

Proposed enrollment during initial five-year charter term:

<i>School Year</i>	<i>Grade Levels</i>	<i>Total Enrollment</i>	<i># of school sites</i>
2015/16	K-4	100	1
2016/17	K-5	120	1
2017/18	K-6	140	1
2018/19	K-7	160	1
2019/20	K-8	180	1

Proposed grade levels when fully expanded: K-8

Total student enrollment when fully expanded: 180

Total number of school sites when fully expanded: 1

Charter School Type: Independent Charter School

Establishing persons or entities (in accordance with RIGL § 16-77.2-1, 16-77.3-1 or 16-77.4-1):

Rhode Island Urban League

Person or Representative of Entity Establishing the School:

Signature: 

Print Name: Belinda Francis

Position/Title: Executive Director of RI Urban League

Date: March 24, 2014

Additional Representative from Applicant Group:

Signature: 

Print Name: Wendy Randle

Proposed Role with Charter School: Executive Director

Date: March 24, 2014

Executive Summary

Mission Statement: Ida Lewis Leadership Academy, a vibrant and diverse K-8 public charter school, empowers its scholars to unlock their potential as lifelong learners and unleash their greatness as leaders. In the spirit of Ida Lewis' life, we embrace the core values of compassion, courage, respect, and determination. Our rigorous, 21st Century curriculum, integrated with technology and experiential learning, fosters creativity, critical thinking, and collaboration. We are committed to educating the whole child and inspiring our scholars to be culturally competent, environmentally conscious global citizens who make a difference in the world.

The namesake of our school, Ida Lewis, is one of the most famous people to have served in the United States Coast Guard. During her 39 years as the keeper of the Lime Rock Light Station, she was credited for saving 18 lives. The Society of the American Cross of Honor named Ida Lewis, "The Bravest Woman in America." Ida Lewis gained her notoriety during the late 1800's when women were not prevalent in the professional workforce, nor were women in the national limelight for acts of heroism. Ida Lewis was a leader and she overcame many biases through her demonstration of compassion, courage, respect and determination.

The founders of Ida Lewis Leadership Academy are striving to instill leadership skills and principles into our scholars so they too, can emerge as leaders in their community. We consulted with a wide variety of stakeholders including parents, local business owners, entrepreneurs, military members, and representatives from higher education and we inquired about the outcomes that are expected from local schools. There was a clear consensus that these stakeholders are looking for citizens who know how to take personal initiative, are able to formulate goals, are able to collaborate and work in harmony with others and are able to resolve conflicts peacefully. This feedback sparked our idea of creating a leadership academy where these powerful skills and habits could be explicitly taught and modeled starting in Kindergarten and continuing through grade eight.

Aside from the need to cultivate leaders in our community, the members of the applicant group identified several other reasons to bring school choice to Newport County. Newport is one of the only urban districts in Rhode Island without a charter school. Parents have discretion over many aspects of their children's lives. However, in Newport County, parents must delegate the critical decision of where to educate their children to those who are unaware of their children's unique needs. The founders of Ida Lewis Leadership Academy strongly believe that parents should be entitled to choose an educational environment that is tailored to their child's individualized needs and learning styles. We are striving to provide Newport County's families with a viable choice of where to educate their children.

The founders of Ida Lewis Leadership Academy are also committed to improving student achievement throughout Newport County with the cultivation of collaborative professional partnerships and the replication of research-based best practices. We will offer ongoing, research-based professional development at Ida Lewis Leadership Academy and we will invite educators from schools throughout Newport County as well as other charter schools to participate in our professional development. These collaborative relationships will in turn improve teaching and learning throughout Newport County.

We believe that our charter school will breathe new vitality and innovation into the community and improve economic prosperity and sustainability. For example, Naval Station

Newport will become a more appealing duty station for families if parents have a choice of where to educate their children. Also, given the increased autonomy and flexibility that charter schools have, our charter school will level the playing field for students with special needs and students who are economically disadvantaged and improve educational outcomes for all students residing in Newport County.

Ida Lewis Leadership Academy will be embedded within the metropolitan fabric of Newport. The natural and historical resources of Newport County will be utilized in a meaningful and purposeful way to enhance the academic program and enrich the overall experience for our scholars. At full capacity, Ida Lewis Leadership Academy will serve 180 K-8 scholars from Newport County. There will be a 1:20 teacher student ratio at Ida Lewis Leadership Academy. The academic programs offered at Ida Lewis Leadership Academy will be as follows:

- *Leader in Me* process to support students in learning and applying the *7 Habits of Highly Effective People* (Covey, 1989)
- Foreign Language K-8
- Balanced Literacy
- Singapore *Math in Focus*
- Multicultural Education
- Financial Literacy
- Library Media Literacy
- Inquiry-based Science
- Science Technology Engineering Mathematics (STEM)
- Creative Arts
- Comprehensive Health & Wellness Program with Swimming, Sailing, and CPR
- Advancement Via Individual Determination (AVID) for grades 5-8

The following components of our educational program will further enhance and enrich learning experiences for our scholars:

- Experiential Learning (Learning by doing)
- Integration of technology in every core subject
- Service learning projects in each grade with opportunities for students to be leaders
- Individual Student Success Plans (EVERY CHILD WILL ACHIEVE SUCCESS)
- Healthy and balanced breakfast and lunch program prepared by our Executive Chef (Students and staff will enjoy a peaceful and relaxing dining experience in our very own Lighthouse Cafe).
- Extended School Year – 190 days
- Extended School Day – 8:00-6:00

The individuals who comprise the applicant group have a wide range of knowledge, experience, and expertise in education and educational leadership. The founder and proposed Executive Director, Wendy Randle, currently serves as the Interim Head of School at Paul Cuffee School in Providence, RI. For the past nine years, Ms. Randle has served in educational leadership capacities in the states of Massachusetts, South Carolina, and Rhode Island. Ms.

Randle began her career in education as a first grade teacher in Newport and that community is where her heart remains. Mary Caporelli, an educational consultant who has served in a variety of educational leadership roles throughout Rhode Island will assist with the academic program development, recruitment of staff, and the selection of research-based best practices at Ida Lewis Leadership Academy. Victoria Tolbert-Bravo currently serves as the Dean and Spanish Teacher at Paul Cuffee Middle School. Ms. Bravo will be charged with developing the scope and sequence for our foreign language program and she will serve on our Board of Trustees. Michael Corcoran, a retired Army Lieutenant Colonel, will serve as a Board member and a human resource and finance advisor. Dr. Susan Pasquarelli, a professor from Roger Williams University, will serve on our Board and she will assist with the development of our literacy program. Michelle Casey, a Client Partner from FranklinCovey, will be responsible for helping with the implementation of *The Leader in Me* program, which infuses the 7 Habits of Highly Effective People (Covey, 1989) into our interconnected adult and student culture. Tomma Botelho, an executive from Home Loan Investment Bank, will serve on the Board of Trustees and work directly with our Finance Officer and our Executive Director on ensuring that our organization remains viable and financially sustainable. Ms. Botelho will also support our philanthropic outreach endeavors.

Teachers at Ida Lewis Leadership Academy will thrive as members of a Professional Learning Community (PLC). As explained by DuFour (2004), the essential ingredients of a PLC are as follows: the creation of an environment in which all students learn, the cultivation of a culture of collaboration that is focused on continuous school improvement, and an emphasis on measurable results. Our diverse team of teachers who are preferably dual certified, will be expected to become “experts” in at least one of our initiatives (Experiential Learning, Integration of Technology, Framework for 21st Century Skills, *The Leader in Me* program and Whole Child Education). Through the efficient and effective utilization of internal experts, we will build leadership capacity by expanding the professional knowledge and expertise of our faculty from within. Teachers will be afforded the opportunity to conduct peer observations to improve and enhance their craft as reflective practitioners. The Executive Director will also support the growth and development of the teachers through the implementation of the Rhode Island Teacher Support and Evaluation Model and each of our teachers will be assigned a peer mentor as part of a formal mentorship program.

Wendy Randle will serve as the Executive Director of Ida Lewis Leadership Academy. A part-time Financial Officer will ensure fiscal responsibility and sustainability. In addition to evaluating the performance of the Executive Director, our Board of Directors will ensure that Ida Lewis Leadership Academy fulfills its mission, achieves academic success for all scholars, manages funds responsibly and completes the requirements for charter renewal. Ida Lewis Leadership Academy’s fiduciary sponsor and establishing entity will be the Rhode Island Urban League. Potential community partnerships with Sail Newport, Save the Bay, the International Yacht School of Restoration (IYRS), Alex & Ani and the Boys and Girls Club of Newport will further enhance our academic and enrichment programs.

Section I - Mission Statement

Ida Lewis Leadership Academy, a vibrant and diverse K-8 public charter school, empowers its scholars to unlock their potential as lifelong learners and unleash their greatness

as leaders. In the spirit of Ida Lewis' life, we embrace the core values of compassion, courage, respect, and determination. Our rigorous 21st Century curriculum, integrated with technology and experiential learning, fosters creativity, critical thinking, and collaboration. We are committed to educating the whole child and inspiring our scholars to be culturally competent, environmentally conscious global citizens who make a difference in the world.

The applicant group was very intentional in selecting Ida Lewis as the namesake of the school. Ida Lewis is one of the most famous people to have served in the Coast Guard. During her 39 years as the keeper of the Lime Rock Light Station, she was credited for saving 18 lives. The Society of the American Cross of Honor named Ida Lewis, "The Bravest Woman in America." Ida Lewis gained her notoriety during an historical period in which women were not prevalent in the professional workforce, nor were women in the national limelight for acts of heroism. Ida Lewis was a leader who overcame many biases through her demonstration of compassion, courage, respect and determination.

The core values woven into our mission statement reflect the life of Ida Lewis. In the spirit of Ida Lewis's life, we will instill in our scholars compassion, courage, respect, and determination so they too can overcome obstacles in life and make a difference in the world. These core values are the foundation upon which our organization is built. Additionally, these values represent our emphasis on educating the whole child and the focus that will be placed on the socio-emotional growth and character of our scholars.

We describe our curriculum as being rigorous because rigor is amongst the 3 R's (rigor, relevance, and respectful relationships) that are of increasing importance in our classrooms (Wagner and Kegan, et al 2006). Creativity, critical thinking, and collaboration are learning and innovation skills referenced on the *Partnership for 21st Century Skills* website (*Partnership for 21st Century Skills*, www.p21.org), that lead to student success in the global economy. When creating our curriculum, we will connect the Common Core State Standards and the Next Generation Science Standards to the Framework for 21st Century Learning. The integration of technology and experiential learning describe how we will accomplish our mission and the pedagogical approach that our teachers will employ. Finally, in the spirit of Ida Lewis' life, we pledge our commitment to the cultivation of culturally competent, environmentally conscious global citizens who understand the importance of social justice and find a way to make a difference in the world.

Section II – Community Need and Support

Newport County is the community from which Ida Lewis Leadership Academy intends to draw its students. The municipalities located within Newport County are as follows: Jamestown, Little Compton, Middletown, Newport, Portsmouth and Tiverton. According to statistics extracted from the United States Census Bureau Quick Facts website (<http://quickfacts.census.gov/qfd/states/44/44005.html>), Newport County has experienced a steady decline in population since 1990, when the population was estimated at 87,194 until 2012, when the population was approximately 82,036. The founders of Ida Lewis Academy want to reverse this decline in population through the investment in human capital. In 2001, Glaser and Shapiro conducted a study of America's fastest growing cities. According to their findings, "High human capital cities" grow faster. In other words, growth rates in a community correlate with the average educational level in that particular community. The Founders of Ida

Lewis Leadership Academy want the municipalities in Newport County to thrive, grow, and continue to be viable places to raise a family. The investment in human capital will enhance the viability of this community. The founders of Ida Lewis Leadership Academy are committed to the investment in human capital and the improvement of Newport County's communities. As stated in our mission statement, *"We are committed to educating the whole child and inspiring our scholars to be culturally competent, environmentally conscious global citizens who make a difference in the world."* Ida Lewis Leadership Academy's scholars will distinguish themselves as visionary leaders and creative problem solvers who give back to their communities and improve the quality of the lives around them.

The table below depicts the socio-economic demographics of the municipalities located in Newport County based on the United States Census Data and the 2006-2010 American Community Survey 5-Year Estimates:

Place	Per Capita Income	Median Household Income	Median Family Income	Population	Number of Households
Jamestown	\$38,664	\$63,073	\$77,990	5,622	2,359
Little Compton	\$32,513	\$55,368	\$62,750	3,593	1,475
Portsmouth	\$28,161	\$58,835	\$68,577	17,149	6,758
Middletown	\$25,857	\$51,075	\$57,322	17,334	6,993
Newport	\$25,441	\$49,669	\$54,116	26,475	11,566
Tiverton	\$22,866	\$49,977	\$58,917	15,260	6,077

The following table reflects the student demographics in Newport County:

	Free and Reduced Lunch	English Second Language (ESL)/ Bilingual Education Services	Special Education
Jamestown	10%	<1%	13%
Little Compton	16%	0%	11%
Portsmouth	13%	<1%	16%
Middletown	31%	4%	17%
Newport	58%	3%	18%
Tiverton	28%	<1%	18%

The founders of Ida Lewis Leadership Academy embrace the theory that education is an investment in human capital and the quality of an educational system directly impacts the viability of a community's economy. In fact, there are many studies that examine the correlation between public schools and the economy (National Education Association 2003, ECONorthwest 2002, Gottlieb and Fogarty 1999, Kerchner 1997, Picus and Bryan 1997, Sederberg 1987, Brisson 1986). In addition to increasing productivity, research shows that quality public schools can help make states and localities more economically competitive (Weiss, 2004). The founders of Ida Lewis Leadership Academy want to be part of the solution in enhancing the economy of Newport County.

We strongly believe that the presence of a charter school in Newport County will improve the quality of life for Newport County's children and families, revitalize the economy,

and make Newport County a more appealing place to reside. There is a wide body of research that emphasizes the increasing importance of launching businesses in places with a high quality of life that will attract skilled workers. Furthermore, the quality of public schools has become a determining factor in a community's overall quality of life (Salvesen and Renski 2003, Florida 2002, Urban Land Institute 2002, McGranahan 2000 and 2002, Florida 2000, Burger 1999, Love and Crompton 1999, Segedy 1997). As stated by Weiss (2004), "The quality of education is often a factor in determining a community's quality of life." In the spirit of Ida Lewis' life, the founders of Ida Lewis Leadership Academy are committed to improving the quality of life for the children and families of Newport County.

We consulted a wide cross-section of stakeholders in the community to gather input in relation to the educational and programmatic needs of Newport County's children and families. We interviewed parents, students, teachers, retired teachers and administrators, political figures, business owners, military members and representatives from higher education. Based on the perception data that has been gathered from these key informants, the founders of Ida Lewis Leadership Academy strongly believe that there is a pressing need to establish a charter school in Newport County for the following reasons:

- Newport is one of the only urban districts in Rhode Island that does not have a charter school.
- Newport County's families deserve to have a choice of where to educate their children.
- A charter school has the potential to improve learning outcomes for all students throughout Newport County through the cultivation of collaborative partnerships and the replication of research-based best practices.
- Ida Lewis Academy will breathe new vitality and innovation into the community.
- Ida Lewis Academy will remedy the perceived over-enrollment phenomenon at the Pell School.
- Learning walks between schools in Newport County and Ida Lewis Leadership Academy will provide teachers with new and rich perspectives and expanded professional networks.
- The economic prosperity and sustainability of Newport County is contingent upon a strong educational infrastructure. Ida Lewis Leadership Academy will further enhance the educational infrastructure.
- Ida Lewis Leadership Academy's existence will make Naval Station Newport a more appealing duty station, which will in turn further stimulate the economy in Newport County.
- Given the increased autonomy and flexibility that charter schools have, Ida Lewis Leadership Academy will be equipped to level the playing field for diverse learners.

The founders of Ida Lewis Leadership Academy will strive to enhance and build upon the existing educational opportunities that are already available in Newport County. Our modus operandi is not to cast blame or shame upon the school districts in Newport County. We recognize that "consumer choice has created the most innovative and powerful economy in the world. Choice makes computers cheaper, images sharper, cars safer, and services faster. Choice rewards success and weeds out stagnation, inefficiency, and failure" (Bush, 2014). We also believe in the power of collaboration versus competition. Thus, we intend to cultivate

collaborative partnerships with schools throughout Newport County so together, we can improve the quality of education for all students. According to wide body of research, effective instruction is the variable that has the deepest impact on student achievement. For this reason, we are committed to opening our doors to educators throughout Newport County so they can benefit from the rich professional development opportunities that we will provide. We are confident that if we collaborate with teachers throughout Newport County, all students will benefit from the two-way flow of information, innovation, and research-based best practices.

The founders of Ida Lewis Leadership Academy will continue to tap into the knowledge and expertise of community stakeholders to further develop and refine its programs. We will host public forums to solicit ideas and gain a deeper understanding of the community's needs. For example, the Alliance for a Livable Newport has offered to host a forum so we can share our vision and find out exactly what Newport County's citizens are looking for in a school. We will also meet with elected officials and school department personnel in each of the municipalities to find out how we can be part of the solution in improving the quality of education for all of the students residing in Newport County. Finally, we will launch a door-to-door campaign in a variety of Newport County's neighborhoods to promote our school and build positive relationships with an even wider range of community stakeholders.

In addition to being sponsored by the RI Urban League, we will strive to cultivate synergistic relationships and partnerships with the following organizations:

- Newport County Boys & Girls Club or YMCA – swimming and afterschool enrichment
- Sail Newport – summer sailing camp and after school enrichment
- Ida Lewis Yacht Club – preserving the legacy of Ida Lewis
- Bank Newport – commercial lender and financial literacy for students and families
- International Yacht School of Restoration – educational program enrichment
- Alex and Ani – fundraising and community outreach
- Save the Bay – educational program enrichment
- Child and Family Services – family engagement and support services
- East Bay Educational Collaborative – Gems-net science kits
- Partnership for 21st Century Skills – curriculum development and alignment
- POW Science – STEM program development and enrichment
- Newport Martial Arts – wellness program development
- Mama Leone's Pizzeria Ristorante – fundraising and community outreach
- Kelle's Little Café – food service provider and caterer for school functions
- Mad Hatter Bakery – caterer for school functions

Section III – Goals

The formulation of Ida Lewis Leadership Academy's goals involved a comprehensive analysis of the Performance Framework referenced in the *Rhode Island Charter Schools: Performance Review Handbook*. Ida Lewis Leadership Academy's founders considered the following three questions referenced in this handbook: 1. Is the school's educational program an academic success? 2. Is the school providing the appropriate conditions for success? 3. Is

the school a viable organization? The following are the goals for Ida Lewis Leadership Academy:

ACADEMIC GOALS

Goal 1: Students will demonstrate steady longitudinal growth in reading, writing, and mathematics and they will perform at or above grade level by third grade and remain at or above grade level through eighth grade.

- *Measure:* Eighty percent of students at Ida Lewis Leadership Academy will achieve proficiency on the NECAP and/or PARCC state standardized assessment.
- *Measure:* Ninety percent of students at Ida Lewis Leadership Academy will score at or above grade level on the Fountas & Pinnell Benchmark Assessment by the end of each academic year.
- *Measure:* Eighty percent of students in grades 3-8 students will attain proficiency in mathematics and language arts on a national standardized test such as the Terra Nova.
- *Measure:* One hundred percent of students identified as Limited English Proficient will demonstrate average or above-average longitudinal growth in English fluency as measured by ACCESS assessment.

Goal 2: Eighth graders at Ida Lewis Leadership Academy will demonstrate proficiency in Tech Literacy.

- *Measure:* One hundred percent of Ida Lewis Leadership Academy's eighth graders will achieve a score of proficient or advanced on the 21st Century Skills Assessment by the conclusion of eighth grade.

Goal 3: Eighth graders will demonstrate Spanish language proficiency.

- *Measure:* Ninety percent of our eighth graders will achieve proficiency or above on a standardized Spanish language proficiency assessment.

Goal 4: All students at Ida Lewis Leadership Academy will complete service-learning projects bi-annually.

- *Measure:* One hundred percent of Ida Lewis Leadership Academy's students will complete service-learning projects bi-annually. Service-learning projects will be assessed by teachers, presented to the Executive Director for final approval, and showcased at our annual Service Learning Fair.

ORGANIZATIONAL GOALS

Goal 5: Ida Lewis Leadership Academy will engage families and community stakeholders in the process of continuous school improvement.

- *Measure:* One hundred percent of Ida Lewis Leadership Academy's families will participate in two parent/teacher/student conferences through one of the following vehicles: face-to-face meetings, telephone conferences, Skype/Face Time, or home visits.
- *Measure:* Ida Lewis Leadership Academy will continuously increase its community and/or business partnerships on a yearly basis.
- *Measure:* Ninety five percent of Ida Lewis Leadership Academy's families will complete the Annual Parent Satisfaction Survey. One hundred percent of our

families will indicate that Ida Lewis Leadership Academy is a safe place and ninety five percent of our families will indicate that Ida Lewis Leadership Academy has high expectations for its students.

- *Measure:* An annual Parent Engagement Survey will be administered on a yearly basis to identify the unique skills and talents our parents. Parents' skills, talents, and areas of expertise will be matched with the needs of our school.

Goal 6: Ida Lewis Leadership Academy will use data to improve instruction, identify professional development needs, enhance the climate and culture, monitor staff sustainability, and calibrate the attainment of the mission.

Measure: The Rhode Island Model Teacher Evaluation and Support System has built in features that can be used to identify trends in relation to teaching and learning and determine professional development needs. Following each round of teacher evaluations, data will be collected to identify strengths and opportunities for improvement.

Measure: Student achievement data from a wide variety of sources including formative and summative assessments will also be used to determine staff professional development needs on a regular basis during monthly data team meetings.

Measure: An annual climate, culture, and staff sustainability survey will be administered to determine the extent to which all members of the community are fulfilling the mission and demonstrating the core values.

Goal 7: Ida Lewis Leadership Academy will be a viable, sustainable, and fiscally sound organization.

Measure: In accordance with the U.S. Department of Education's composite score for nonprofit and proprietary organizations, Ida Lewis Leadership Academy will maintain a composite score of 2.0 or 3.0.

Measure: The Finance Committee of the Board of Trustees will review the budget on a quarterly basis. Ida Lewis Leadership Academy's annual budget will demonstrate the effective allocation of financial and human resources as measured by the balanced budget submitted to RIDE.

Measure: Ida Lewis Leadership Academy will submit an audited financial statement for every fiscal year demonstrating that the organization has met or exceeded professional accounting standards.

Section IV – Educational Program

Ida Lewis Leadership Academy will provide a rigorous, engaging, and supportive learning environment where the "whole child" is valued and cherished. In the spirit of Ida Lewis' life, we will teach our students the importance of demonstrating courage, compassion, respect and determination. As a result of embedding these core values into everything we do, our students will have the courage to overcome obstacles in their lives, the compassion to show how much they value the lives of others, the respect for one another and respect for the environment, and the determination to achieve their individual goals, pursue their dreams, and make the world a

better place. These important life lessons will be woven into the curriculum and expand beyond the curriculum as part of our emphasis on the “whole child.”

Teachers at Ida Lewis Leadership Academy will be charged with tailoring instruction to each child’s individual learning styles and cultivating a supportive and nurturing learning environment that is molded to children’s unique needs. We believe that learning is more meaningful when it is experiential and connected to real-life contexts. At the heart of experiential learning is the premise that the *process* is equally as important as the *product*. For it is during the process of experiential learning that students interact with the content, their teacher and one another, and they have the opportunity to engage in self-reflection and apply their learning new situations. According to Haynes (2007) and Davis (2011), the following sequential steps take place during experiential learning:

1. Experience and exploration (hands-on activities with as-needed support from the teacher)
2. Sharing and reflection (sharing and exchanging observations, feelings and ideas with peers in relation to the learning process)
3. Processing and analysis (engaging in metacognition as well as analyzing and defining the learning)
4. Generalization (connecting learning experiences to real-life examples)
5. Application (applying learning to new situations and experiences)

In order to efficiently and effectively meet the individualized needs of our students, we will use instructional time in creative and innovative ways. Our grade-spans will be separated into three leadership academies: K-2, 3-4, and 5-8. The K-2 configuration will apply the looping model. The Kindergarten teacher will loop from Kindergarten to 1st grade and then to 2nd grade. Following the third year with a particular student cohort, the teacher will be reassigned to Kindergarten for the next looping cycle. By allowing students to remain with the same teacher in kindergarten through grade two, our educators will have the opportunity to build rich relationships with our scholars and their families which will in turn cultivate trusting, caring, and nurturing classroom environments. This structure will also allow our early childhood teachers the opportunity to develop a deep and intimate understanding of our students’ learning styles, interests, strengths, and opportunities for growth. In addition, the implementation of the looping model at Ida Lewis Leadership Academy will support and enhance our students’ socio-emotional needs and increase their confidence in themselves as learners and leaders. The looping structure will increase accountability of teaching and learning and it will provide a supportive classroom environment, a richer curriculum, and an opportunity for teachers to postpone high-stakes decisions that would dramatically impact a child’s educational career (Rasmussen 1998).

The third and fourth grade teachers will share students and they will departmentalize the content areas. For example, the third grade teacher will teach Literacy and Multicultural Studies to students in grades 3 and 4. The fourth grade teacher will teach mathematics and science to students in grades 3 and 4. This instructional model will benefit our students in a multitude of ways. First and foremost, the teachers will be afforded the opportunity to become content-area experts and to teach the subjects in which they are efficacious. In traditional schools, elementary teachers are required to teach all subject areas, which can be challenging

and laborious. The departmentalized model at Ida Lewis Leadership Academy will enable teachers to teach content with great depth and increased rigor. This model will also reflect our philosophy that we are responsible for all students. It truly takes a village to educate children.

Section IV (a). Guiding Principles

- We believe that all children are richly deserving of a high quality, 21st Century education regardless of their abilities, disabilities, ethnicity, race, religion, gender, socio-economic status or the zip code in which they reside. Our role as a charter school is to level the playing field for all learners and provide unique and innovative opportunities that may not otherwise be available in other Newport County's schools.
- We believe in all our scholars' ability to achieve high standards. Scholars at Ida Lewis Leadership Academy will be held to high expectations and they will be provided with the appropriate supports and scaffolding to achieve their maximum potential.
- We believe that families and community stakeholders play a critical role in enhancing teaching and learning.
- We believe that learning is meaningful and purposeful when connected to real-life contexts and problems. Hands-on and minds-on experiences will ensure that students remain engaged in the learning process and they are not passive receivers of meaningless content.
- We believe that service learning cultivates engaged citizenship. In the spirit of Ida Lewis's life, our learners will discover how they can make a difference in their community by sharing their unique gifts and talents and giving back to the community.
- We believe that our scholars' socio-emotional growth is equally as important as their academic and physical growth. Our emphasis on the "whole child" will be manifested in all of our decisions including those related to the allocation of human and fiscal resources and those related to curriculum, assessment, and instruction and the allocation of resources.
- We believe that technology has the power to transform the learning process and improve teaching and learning exponentially. Our teachers will be well versed in the integration of technology and they will open their classrooms as technology integration laboratories so that other educators throughout the state can benefit from their best practices.
- We believe that each of our scholars has unique gifts and talents that will make the world a better place. A critical role of educators is to help students recognize their own inner light.

Section IV (b). Curriculum and Coursework

As stated in Ida Lewis Academy's mission statement, *"Our rigorous, 21st Century curriculum, integrated with technology and experiential learning, fosters creativity, critical thinking, and collaboration. We are committed to educating the whole child and inspiring our scholars to be culturally competent, environmentally conscious global citizens who make a difference in the world"* (Randle 2014). The curriculum at Ida Lewis Leadership Academy will be vertically and horizontally aligned to the following sets of standards: Common Core Standards,

Next Generation Science Standards, the International Society for Technology in Education (ISTE®) Standards, the American Association of School Librarian Standards for the 21st Century Learner, Framework for 21st Century Skills and the National Standards for K-12 Physical Education. *The 7 Habits of Highly Effective People* (Covey 1989) will also be integrated into our curriculum. In addition to employing a part-time Curriculum Consultant to manage the vertical and horizontal alignment, as well as the improvement, assessment and fine-tuning of the curriculum over time, teachers at Ida Lewis Leadership Academy will be required to become “experts” in at least one of our initiatives and they will be empowered to lead Professional Learning Communities (PLC’s) in order to build capacity from within.

The table below depicts a K-8 outline of the course of study that will be offered at Ida Lewis Leadership Academy:

K	1	2	3	4	5	6	7	8
<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>	<i>Math in Focus Singapore Math</i>
Balanced Literacy	Balanced Literacy	Balanced Literacy	Balanced Literacy	Balanced Literacy	English Language Arts	English Language Arts	English Language Arts	English Language Arts
Inquiry-based Science	Inquiry-based Science	Inquiry-based Science	Inquiry-based Science	Inquiry-based Science	Inquiry-based Science	Inquiry-based Science	Inquiry-based Science	Inquiry-based Science
Multicultural Studies	Multicultural Studies	Multicultural Studies	Multicultural Studies	Multicultural Studies	Multicultural Studies	Multicultural Studies	Multicultural Studies	Multicultural Studies
Specials: 1-Spanish 2-STEM 3-Creative Arts 4-PE/Health 5-Information, Technology & Media	Specials: 1-Spanish 2-STEM 3-Creative Arts 4-PE/Health 5-Information, Technology & Media	Specials: 1-Spanish 2-STEM 3-Creative Arts 4-P/Health 5-Information Technology & Media	Specials: 1-Spanish 2-STEM 3-Creative Arts 4-PE/Health 5-Information, Technology & Media	Specials: 1-Spanish 2-STEM 3-Creative Arts 4-PE/Health 5-Information Technology & Media	Specials: 1-Spanish 2-STEM 3-Creative Arts 4-PE/Health 5-Information Technology & Media	Electives: 1-Spanish 2-AVID 3-Creative Arts 4-PE/Health 5-STEM	Electives: 1-Spanish 2-AVID 3-Creative Arts 4-PE/Health 5-STEM	Electives: 1-Spanish 2-AVID 3-Creative Arts 4-PE/Health 5-STEM

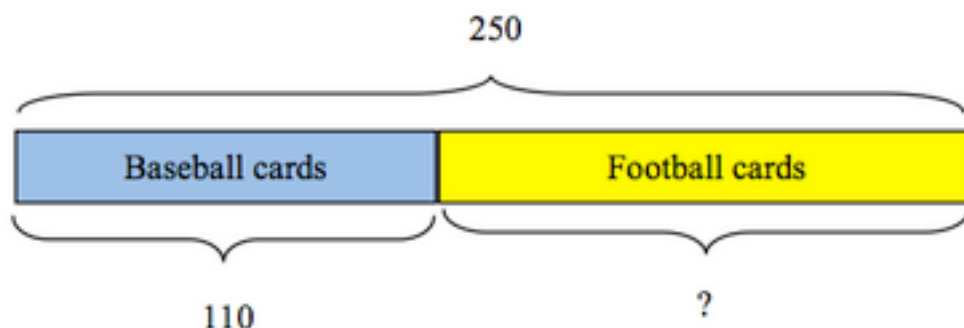
Math in Focus

As reflected in the table above, Ida Lewis Leadership Academy will adopt the *Math in Focus* Singapore Math program by Marshall Cavendish. In addition to being aligned to the Common Core Standards, this program ensures that students demonstrate mastery of mathematical concepts, computational skills, problem-solving strategies and real-life applications. An emphasis of *Math in Focus* is the interrelationships of mathematical concepts and the connections between concepts and topics. When students have a solid understanding of how mathematical concepts are interrelated, they are better equipped to assimilate this knowledge and apply the accompanying skills to new situations and contexts.

The *Math in Focus* program is grounded in the learning theories of Dr. Jerome Brunner as well as Richard Skemp’s *Theory of Understanding* and the *Theory on Constructivism*. Bruner’s theory on representations of mathematical concepts (1966) is woven throughout the *Math in Focus* program and it focuses on the concrete, pictorial, and abstract levels of children’s thinking. “Model drawing” also known as “bar modeling” is a key strategy that is used to

represent word problems and number relationships. Below is an example of “model drawing” provided by Jackson (2010):

“Frank has 250 baseball and football cards altogether. He has 110 baseball cards. How many football cards does he have?”



This representational strategy deepens students’ understanding of the relationship between the part and the whole.

According to Skemp (1986, 1977), children learn new mathematical concepts by connecting their prior knowledge to their new learning. Skemp suggests that there are two kinds of mathematical learning: instrumental understanding and relational understanding. Instrumental understanding describes mechanical and/or rote learning, while relational understanding takes place when the learner recognizes patterns, relationships, and connections between mathematical concepts. The *Math in Focus* program includes a blend of both instrumental and relational understanding. For example, there is a component of mental computation that is demonstrative of instrumental learning and the model approach depicted above demonstrates relational learning.

The founders of Ida Lewis Leadership Academy were very intentional in selecting the *Math in Focus* program. Of particular importance is this program’s alignment to the constructivist theory and experiential learning theory. A common characteristic of Vygotsky’s constructivism theory (1978) and Kolb’s theory of experiential learning (1984) is the element of student interaction with the socio-cultural environment. The founders of Ida Lewis Leadership Academy strongly believe that reflection and student interaction improve learning outcomes, because both endeavors require students to be metacognitive and to communicate mathematically. When students have numerous opportunities to communicate their mathematical ideas in writing and amongst their peers, they acquire a deeper understanding of mathematical concepts. In addition to being grounded in learning theories that are embedded in our mission statement, we also chose this program because Singapore has distinguished itself as a high performing nation as evidenced by the Trends in International Math and Science Study (TIMSS) reports of 1995, 1999, 2003, and 2007.

Balanced Literacy

Our high quality English language arts program of study will employ a Balanced Literacy approach that is grounded in the research of Fountas and Pinnell (2011). We selected this framework because there is a strong correlation between the Common Core Standards for

Language and Fountas and Pinnell's *Continuum of Literacy Learning*. The overarching objective of both documents is to ensure that all students are equipped with the appropriate literacy skills and competencies for careers and/or college by the time they graduate from high school. The curriculum goals specifically outlined in the *Continuum of Literacy Learning* ensure the students attain this high level of skill by the conclusion of eighth grade. The balanced literacy framework provides teachers with the foundation for integrating instruction that will support the goals for the common core state standards. "To build a foundation for college and career readiness, students must read widely and deeply from among a broad range of high-quality, increasingly challenging literary and informational texts. Through extensive reading of stories, dramas, poems, and myths from diverse cultures and different time periods, students gain literary and cultural knowledge as well as familiarity with various text structures and elements. By reading texts in history/social studies, science, and other disciplines, students build a foundation of knowledge in these fields that will also give them the background to be better readers in all content areas. Students can only gain this foundation when the curriculum is intentionally and coherently structured to develop rich content knowledge within and across grades. Students also acquire the habits of reading independently and closely, which are essential to their future success" Common Core State Standards Document (2012): http://www.corestandards.org/assets/CCSSI_ELA%20Standards.pdf.

Another reason for our selection of Fountas and Pinnell's balanced literacy approach is the fact this framework addresses and is responsive to the needs of all learners, honors teachers as informed decision-makers, is adaptable, and is grounded in research. A balanced literacy approach provides students with daily opportunities to engage in authentic reading and writing experiences that are rigorous and relevant to their everyday lives. During a balanced literacy block, students participate in read-aloud, shared reading, guided reading, independent reading and word study. Additionally, participate in a modeled writing lesson as well as shared writing, interactive writing, guided writing, and independent writing. During balanced literacy instruction, there is a gradual release of responsibility based on each learner's individualized needs.

The role of the teacher within a Balanced Literacy framework is to serve as a facilitator of learning through modeling, guiding, and coaching student before gradually releasing the responsibility to the students. The role of the administrator is to collect, analyze, and monitor student achievement data and engage data teams in open and honest conversations about the patterns of need and the identification of interventions that will improve teaching and learning. The administrator will also provide teachers with the necessary coaching tailored to individual teacher's needs, model instruction, and support teachers in obtaining the necessary resources to enhance instruction.

The implementation of Balanced Literacy will afford Ida Lewis Leadership Academy with flexibility and autonomy to allocate instructional time strategically and select instructional resources that are matched to students' needs, learning styles, and interests. Balanced Literacy will take place at the same time across grade levels at Ida Lewis Leadership Academy, so students can flow seamlessly into other classrooms. For example, if there is a Kindergartener who is reading on a third grade level, with the permission and consent of the parent and the recommendation of the educational team, this child can visit a third grade classroom during the literacy block. The founders of Ida Lewis Leadership Academy recognize that not all learners

progress at the same rate, and as educators, we need to be creative and innovative in how we are meeting the diverse needs of our learners. With regard to instructional resources, we will purchase a wide array of non-fiction leveled readers that will be used during guided reading. The themes of these non-fiction readers will align with 21st Century themes of Global Awareness, Financial, Economic, Business, and Entrepreneurial Literacy, Civic Literacy, Health Literacy, and Environmental Literacy as well as the *7 Habits*. As a result, the guided literacy block will often be interdisciplinary with the inclusion of science and social studies concepts woven through the authentic literature.

Inquiry-based Science

Ida Lewis Leadership Academy's high quality science education program of study will promote scientific literacy of all students. There will be a strong emphasis on inquiry-based science given the fact that the Next Generation Science Standards are heavily focused on the process of inquiry and the lowest student achievement is demonstrated on the science inquiry component of the NECAP. Thus, science inquiry is clearly an area that needs increased attention throughout the curriculum.

In accordance with the Next Generation Science Standards (2013), science instruction at Ida Lewis Academy will incorporate the following three dimensions: Science and Engineering Practices, Disciplinary Core Ideas, and Cross Cutting Concepts. The 8 practices for the K-12 Science Classroom are:

1. Asking questions (for science) and defining problems (for engineering)
2. Developing and using models
3. Planning and carrying out investigations
4. Analyzing and interpreting data
5. Using mathematics, information and computer technology and computational thinking
6. Constructing explanations (for science) and designing solutions (for engineering)
7. Engaging in argument from evidence
8. Obtaining, evaluation, and communicating information

In addition to meeting the criteria referenced in the Next Generation Science Standards (2013), Disciplinary Core Ideas will be aligned to the 21st century interdisciplinary theme of environmental literacy. Students at Ida Lewis Leadership Academy will demonstrate knowledge and understanding of the environment; they will deepen their understanding of society's impact in the consumption of natural resources; they will identify and analyze environmental issues, and develop solutions that motivate others to take action.

The science curriculum at Ida Lewis Leadership Academy will also incorporate the crosscutting concepts. Crosscutting concepts as described in the Next Generation Science Standards (2013), are applicable across all domains of science. Crosscutting concepts include the following:

- Patterns similarity, and diversity
- Cause and effect
- Scale, proportion and quantity
- Systems and system models
- Energy and matter

- Structure and function
- Stability and change

The Curriculum Development Team at Ida Lewis Leadership Academy will support and guide teachers in developing the science curriculum organically and selecting instructional materials that are appropriately matched and tailored to our students' individualized needs. This team will also evaluate the FOSS kits that are provided by East Bay Educational Collaborative versus the GEMSNET science kits offered by the University of Rhode Island and determine which science materials best meet our programmatic needs. The Curriculum Development Team will also conduct extensive research on blended learning and experiential learning opportunities in the surrounding community that will further enrich and enhance the science education program of study. An example of a community-based experiential learning opportunity would be having our students visit King Beach in Newport to collect and test water samples. This beach is often restricted due to high levels of bacteria. Students will investigate this problem and apply the process of scientific inquiry to determine why there are high levels of bacteria during certain times of year.

Multicultural Studies

Ida Lewis Leadership Academy's Social Studies program of studies will be aligned to the Rhode Island Grade Span Expectations (GSEs) for Social Studies and the Partnership for 21st century interdisciplinary themes of Global Awareness and Civic Literacy (www.P21.org). Students will also learn about the life of Ida Lewis and her role in Newport history. The Curriculum Development Team will guide and support teachers in developing their curriculum organically while keeping the mission statement at the forefront of all curricular and instructional decisions. In the spirit of Ida Lewis's life, students at each grade level will complete two service-learning projects per year in which they will identify a problem in the community, work collaboratively to develop a solution, and execute the solution by giving back to the community.

There will also be a strong emphasis on multicultural studies with the ultimate goal of enhancing teachers' and students' cultural competency. In our mission statement, we pledge our commitment to *"inspiring our scholars to be culturally competent, environmentally conscious global citizens who make a difference in the world."* According to Banks (2009), "The purpose of cultural competence is to establish developmentally appropriate teaching and learning processes to ensure democratic principles, educational equity, human rights, and social justice." Ida Lewis Leadership Academy will collaborate with the Gordon School in East Providence, RI to exchange best practices in multicultural education and engage in peer observations of lessons involving multicultural themes. The entire staff at Gordon School has demonstrated their commitment to multicultural education and the formation of professional learning communities (PLC's) that are focused on multicultural education. Given the current professional relationship between the founding Executive Director of Ida Lewis Leadership Academy and the members of the Gordon team, we will strive to cultivate a professional partnership with Gordon School to build and strengthen our Multicultural Studies program.

Spanish

In addition to deepening students' knowledge and understanding of diverse cultures, Ida Lewis Academy will offer foreign language instruction from Kindergarten through grade eight. Given the steady increase in Spanish speaking people in the United States, we will offer Spanish instruction at Ida Lewis Leadership Academy. According to the 2012 American Community Survey conducted by the [U.S. Census Bureau](#), Spanish is the primary language spoken at home by 38.3 million people aged five or older and this statistic has more than doubled since 1990. Given this dramatic increase in Spanish speakers, the ability to communicate in Spanish has gradually become more of a necessity than a choice, especially in certain parts of our country.

The Spanish curriculum at Ida Lewis Leadership Academy will be aligned to the National Standards for Foreign Language Learning (1999). Our Spanish curriculum will incorporate the five C's recommended in the Standards for Foreign Language Learning: Communication, Cultures, Connections, Comparisons and Communities. Our curriculum developers will also use the American Council on the Teaching of Foreign Languages Proficiency Guidelines (2012) to design a research-based, developmentally appropriate, experiential foreign language program at Ida Lewis Leadership Academy. As part of our commitment to experiential learning, students will learn Spanish through hands-on activities, authentic children's literature written in Spanish, and learning experiences that are relevant to students' everyday lives. We recognize the importance of creating learning experiences that are meaningful and purposeful and extend beyond the four walls of the classroom. Thus, to every extent possible, we will afford students the opportunity to apply their learning to real-life contexts in the community. In addition to bringing community stakeholders into our school to expose children to Spanish speaking cultures, we will bring students to places in the community where they can apply what they have learned and we will expose students to virtual contexts to further enhance their learning. For example, foreign language proficiency tests will be readily available for students to access online and students will also have access to websites such as [freerice.com](#) to practice their skills. As part of the multicultural experience, students will also have the opportunity to participate in games that enhance their knowledge of Spanish vocabulary, perform plays in Spanish, sing songs in Spanish and recite and interpret Spanish poetry.

As indicated in the Statement of Philosophy in the Standards for Foreign Language Learning (1999), "Language and communication are at the heart of the human experience. The United States must educate students who are linguistically and culturally equipped to communicate successfully in a pluralistic American society and abroad." Furthermore, world languages are included as a 21st Century core subject and Ida Lewis Leadership Academy is committed to the 21st Century initiative. To further strengthen our foreign language program of study, best practices will be shared and modeled by a foreign language teacher from Paul Cuffee School. Victoria Tolbert-Bravo who will serve as a Board member and a coach in supporting and guiding the organic development of Ida Lewis Leadership Academy's Spanish program.

Science Technology Engineering Mathematics (STEM)

There is a sense of urgency on a national and local level to improve students' learning outcomes in STEM-related disciplines. For example, as stated in a document published by the

National Research Council (2011), approximately 7 percent of the 8th graders in the United States are not proficient in mathematics when they complete 8th grade as measured by the National Assessment of Educational Progress (NAEP). Furthermore, only 10 percent of 8th graders in the United States met the Trends in International Mathematic and Science Study (TIMSS) benchmark in science in comparison to Singapore where 32 percent of its 8th graders met the benchmark and China where 25 percent of the 8th graders attained the benchmark. Following a thorough examination of the science and mathematics NECAP scores throughout Newport County, the founders of Ida Lewis Academy recognized the clear and pressing need to improve teaching and learning in the disciplines of science and mathematics. We were very intentional in deciding to offer STEM as a specialist subject. In addition to receiving core instruction in mathematics and inquiry-based science, by offering STEM as a specialist subject, we will increase instructional time in these content areas, which will in turn yield higher student learning outcomes over time. By offering STEM to students in grades K-8, we will also provide a solid foundation in these content areas and we will spark students' interest in STEM related careers. As stated in the NEA Foundation 42F report (2012), "STEM education provides critical college and career readiness skills." Furthermore, there is a sense of urgency to make STEM an essential course of study to prevent our country from falling further behind in the global economy. According to a report conducted by the U.S. Congress Joint Economics Committee in April 2012, "[despite] the clear demand for STEM talent by domestic employers, the United States is failing to produce an ample supply of workers to meet the growing needs of both STEM and non-STEM employers...." Furthermore women and minorities are underrepresented in STEM-related fields. Ida Lewis overcame many biases while serving as a lighthouse keeper and we want our students who are traditionally underserved to overcome biases and have a profound impact on the world. The STEM program offered at Ida Lewis Academy will equip students with the skills, knowledge, and experience to pursue a STEM-related career if they wish to do so.

In creating our STEM program, we will draw from best practices demonstrated at other schools including Paul Cuffee School whose STEM program launched during the 2013-2014 academic year. We will also tap into community experts who perform STEM-related jobs. For example, as part of our lighthouse building instructional unit to honor the legacy of Ida Lewis, we will consult with a marine engineering firm based out of Newport County.

Our organically grown STEM program will incorporate the following 21st skills referenced in our mission statement: creativity, collaboration, and critical thinking. The overarching goals of our STEM program will be to:

- Expand students' environmental literacy and consciousness
- Engage students in critical thinking about their role in preserving the natural resources of the world
- Empower students to be part of the solution in making the world a more sustainable place

Ida Lewis Leadership Academy's STEM program will be project-based with an integrated curriculum that is focused on inquiry and provides students with a variety of opportunities to apply science, technology, engineering and math skills. Projects embedded into our STEM program will also be place-based meaning that the students will identify problems in their

community and they will employ the Engineering Design Model to develop solutions to these problems. Newport County is rich in natural resources and we intend to make full use of these resources to support and enhance experiential learning. For example, students in grades K – 5 will learn about the various impacts humans have on their environments. They will discover that they each have a carbon footprint and that we can all make environmentally conscious lifestyle choices that reduce our carbon footprints. Ida Lewis Leadership Academy's STEM program will afford students with a multitude of opportunities to explore the natural resources around them and essentially use the surrounding environment outside the four walls of the school as a natural laboratory.

To every extent possible, Ida Lewis Leadership Academy's STEM curriculum will be connected to the ocean, which was Ida Lewis's natural laboratory. In a biography about Ida Lewis, Lenore Skomar (2002) described Ida Lewis as a "vigilant observer of the harbor around her." As a lighthouse keeper, Ida Lewis learned about wind direction, wind speed and navigation. The students of Ida Lewis Leadership Academy will have similar experiences and they will also have opportunity to apply what they learned to real-life contexts. For example, they will have the opportunity to build their own piece of equipment that monitors wind speed and direction and they will be able to test out their navigational skills by visiting the navigation simulator located at the Surface Warfare Officers School (SWOS) at Naval Station Newport. Additional community partnerships with Sail Newport, Sail to Prevail and Save the Bay will further enrich and expand our STEM program at Ida Lewis Leadership Academy.

Creative Arts

The Creative Arts program at Ida Lewis Leadership Academy consists of a combination of Dance, Music, Theater, and Visual Arts & Design. Local artists, musicians and dance instructors will further enrich our Creative Arts program. The dance component of our Creative Arts program will be taught through a multicultural lens and it will allow our students to express themselves through kinesthetic movement. Students will embark on a journey around the world in which they learn how people in different cultures express themselves through movement. The theater element of our Creative Arts program will provide students in each grade with the opportunity to participate in a theatrical production. Each grade level will perform for their families and stakeholders from the community will of course be invited in to behold the talents of our students. Students in 5th grade will be charged with performing a play that depicts the life of Ida Lewis. The musical component of our Creative Arts program will expose children to music from different cultures and students will have a variety of opportunities to try different musical instruments such as drums and recorders. They will also have the opportunity to create their own musical instruments. Multicultural experiences will be embedded in the visual and design component of our Creative Arts program, which will be aligned to children's literature from around the world.

Physical Education/Health & Wellness

The overarching goal of our comprehensive Physical Education/Health & Wellness program will be to cultivate physically literate individuals who value the importance of maintaining healthy lifestyles. Our comprehensive Physical Education/Health & Wellness program will meet the needs of the whole child. Ida Lewis Leadership Academy will

demonstrate full compliance with the *Rules and Regulations for School Health Programs* in relation to instructional time. Students will participate in Physical Education classes twice per week. Every other class session will be devoted to the delivery of health education. The *National Standards for K-12 Physical Education* will be used to build our Physical Education curriculum. Our core values of compassion, courage, respect, and determination will be woven into our physical education curriculum. For example, students will demonstrate courage by learning how to swim. They will demonstrate compassion and respect for themselves and others in the midst of physical movement activities. Finally, students at Ida Lewis Leadership Academy will demonstrate our core value of determination in establishing and striving to attain their own personal fitness goals.

In addition to teaching students the necessary skills to engage in healthful physical activity, we will expand our students' physical literacy through the cultivation of community partnerships. A potential partnership with the Boys and Girls Club or the YMCA will enable us to offer swimming instruction. Given the fact that our namesake, Ida Lewis was an avid swimmer, we will strive to keep her legacy alive by teaching our students this very important life skill. We will also teach CPR with the assistance of the American Heart Association, which is yet another way to honor our namesake. Other community experts in the health and wellness industry will be invited to Ida Lewis Leadership Academy as guest instructors. For example, students will have the opportunity to partake in yoga, karate, and Zumba for a designated period of time. These rich community-based opportunities will further enhance our students' understanding of how to maintain healthy life styles.

Our certified school nurse teacher and physical education teacher will collaborate in developing a comprehensive health education program that is based on the seven standards for health instruction included in the *Healthy Literacy for all Students: The Rhode Island Health Education Framework*. The *Comprehensive Health Instructional Outcomes* will also be used as a resource to develop our health education program of study. Experts from the field such as nurses, doctors, and dieticians from Newport Hospital will be invited into our school to further enrich our health education program of study.

Advancement Via Individual Determination (AVID)

AVID is a college-readiness program designed for the purpose of providing the necessary supports to students, so they can attend college and achieve their fullest potential. Students in grades five through eight at Ida Lewis Leadership Academy will participate in AVID as an elective. AVID was first developed in 1980 by Mary Catherine Swanson. Swanson's intention was to ensure that underrepresented students were able to achieve success in high school and beyond. The guiding belief of AVID is as follows: **"Hold students accountable to the highest standards, provide academic and social support, and they will rise to the challenge."** Founder **Mary Catherine Swanson**

Ida Lewis's AVID program will level the playing field for minority and economically disadvantaged students, as well as students who may be the first in their families to potentially attend college. There will be a strong emphasis on teaching and reinforcing study and organizational skills. For example, students will be taught how to take notes using the Cornell method. Students will be provided with a 3-ring binder with labeled dividers to support their

organizational skills. There will be an emphasis on college readiness skills such as public speaking, team building and interacting with professors. A critical part of the AVID program is students' access to skilled tutors. Ida Lewis Leadership Academy's AVID tutors will be recruited from the community. We will actively recruit volunteers to serve as AVID tutors from the military community and higher education as well as other STEM-related industries. These tutors will visit the AVID classroom on a regular basis and provide one-on-one and/or small group mentoring to our AVID students. Students will also partake in field trips to local colleges and universities throughout the program to become familiarized with the rigor of the college experience. Our AVID students will complete projects that support cooperative learning and simulate real world contexts. Community outreach will be promoted throughout the program and students will be expected to complete service-learning projects demonstrating their commitment to the community. Finally, students will be provided with resources to help them apply for scholarships and grants to colleges and universities of their interest.

The AVID program has grown exponentially and according to statistics gleaned from the AVID website (www.avid.org), AVID programs exist in 45 states, the District of Columbia, and 16 countries/territories. In addition, the AVID program serves more than 400,000 students in grades 4-12. According to the findings of studies conducted by Watt, Huerta, and Lozano (2007), AVID students have higher expectations of themselves, an understanding of college expectations and are better prepared for the college experience.

Information, Technology and Media

The Information, Technology and Media program of studies at Ida Lewis Leadership Academy will be aligned to the following standards: International Society for Technology in Education (ISTE®) Standards, the Rhode Island Information Literacy Standards the American Association of School Librarian Standards for the 21st Century Learner, and the Framework for 21st Century Skills. The overarching objective of our Information, Technology and Media program will be to expand students' information literacy and media literacy capacity through the use of digital, visual, textual, and technological resources. Through direct, explicit instruction, modeling and guided practice, students will learn how to access and evaluate information, use and manage information, and analyze and create media products (Partnership for 21st Century Skills, 2009).

In addition to gradually building a rich and expansive library of books that are developmentally appropriate, tailored to students' interests, and connected to the mission of our school, Google Chrome Books will be purchased to further enhance the curriculum and engage the students in experiential learning. Students will have a variety of opportunities to apply their knowledge and skills to real-life contexts. For example, students in a designated grade will participate in an interdisciplinary unit on lighthouses in honor of our namesake. As a final product, students will create their own documentaries about Ida Lewis. In addition to conducting research using a variety of sources, students will be afforded the opportunity to share their knowledge with their peers using Powerpoint, Prezi, or by creating a Youtube video with a group of their peers.

The scope and sequence of Ida Lewis Leadership Academy's Information, Technology, and Media (ITM) program will be developed collaboratively by our classroom teachers and our

ITM teacher. To every extent possible, the content of our ITM program will be integrated and aligned to the science and social studies content being taught in our classrooms. In addition to providing direct, explicit instruction in topics related to information literacy and media literacy, our ITM teacher will be a resource for our classroom teachers. Our ITM teacher will also cultivate a collegial relationship with the librarian of the Newport Public Library and the Salve Regina University Librarian. Field trips to these libraries will be scheduled regularly.

Section IV(c). Learning Environment and Pedagogy

The founders of Ida Lewis Leadership Academy conducted extensive research on best practices in relation to class size, class layout and class structure. Research on classroom environment has demonstrated that student and teacher behaviors are impacted by the physical arrangement of the classroom (Savage, 1999; Stewart & Evans, 1997; Weinstein, 1992). Furthermore, well-structured classrooms enhance student academic and behavioral outcomes (MacAulay, 1990; Walker, Colvin, & Ramsey, 1995; Walker & Walker, 1991). The learning environment at Ida Lewis Leadership Academy will be conducive to meeting the individualized needs of the whole child through the integration of technology in each content area and experiential learning. Students will thrive and achieve their maximum potential in our small, nurturing learning environment. A teacher student ratio of 1:20 will ensure that our teachers have adequate one-on-one conferencing time as well as small group time with our students. Learning will also be enhanced and supported by the Teacher's Assistants who will be assigned to classrooms in grades K and 2. Three additional Teacher's Assistants will provide support to students in grades 3-8. Each classroom will be equipped with a Smart Board and a classroom set of Google Chrome Books to further enhance teaching and learning. The Smart Response system will eventually be purchased for grades 3-8. This innovative tool will assist teachers with collecting data that will in turn guide and drive their instruction.

Our classrooms will be aesthetically pleasing and inviting for our students, teachers and families. There will be an abundance of natural sunlight flowing in through our windows. The walls will be adorned with student-created artwork and anchor charts as opposed to commercially produced posters. Each classroom will be equipped with a leveled library of developmentally appropriate texts. The arrangement of students' desks and tables will be conducive to cooperative group work. Teachers will have a choice in deciding whether to purchase tables or individual desks, but the expectation will be that to every extent possible, students will work in cooperative groups. There will also be a kidney-shaped table in each classroom where the teacher conducts one-on-one conferences or meets with small groups for guided instruction. Finally, each room will have a rug where students can gather for community meetings and whole-group instruction.

Ida Lewis Leadership Academy's team of teachers will draw from a wide array of research-based best practices to enhance teaching and learning and ensure that all students have equitable access to the curriculum. Our Curriculum Development Consultant will lead the faculty in exploring these practices and determining the extent to which these instructional methods yield positive student outcomes. The following is a list of research-based instructional strategies that will be examined and implemented by Ida Lewis Leadership Academy's faculty:

1. Marzano's *Ten Effective Research-Based Instructional Strategies* (2000)
2. DuFour's *Four Essential Questions* (2006)

3. Ruby Payne's *Framework for Understanding Poverty* (2005)
4. Kagan's *Cooperative Learning Strategies* (1985)
5. Gardner's *Multiple Intelligences* (1999)
6. Tomlinson's *Differentiated Instruction* (2010)
7. Lemov's *Teach Like a Champion: 49 Techniques that put Students on The Path to College* (2010)
8. Kermin's **Teacher Expectation Student Achievement (TESA) Practices** (1972)
9. Covey's *7 Habits* (1989)

Section IV (d). Specific Populations

1. Struggling Students

Ida Lewis Leadership Academy will be fully equipped and prepared to serve all students regardless of their abilities or disabilities. The classrooms at Ida Lewis Leadership Academy will be fully inclusive. We will recruit teachers who are dually certified in special education and regular education as well as teachers who hold ELL endorsements. Teachers will be adept at modifying instruction and differentiating the content, process and product so all learners will have equitable access to the curriculum. Our staff will also be trained in implementing the Response to Intervention (RTI) model to identify struggling learners and apply research-based interventions to improve students' learning outcomes. Our RTI team, comprised of the Executive Director and several teachers, will meet on a weekly basis. Teachers who refer students to the RTI team will be required to bring authentic pieces of student work and assessments, which will be examined and evaluated by the team. Subsequently, the RTI team will identify and recommend interventions to the classroom teacher, which will in turn be applied for 6-8 weeks. The website, <http://www.interventioncentral.org/tools/academic-intervention-planner-struggling-students> is one of many tools that will be used to identify interventions that are tailored to the specific needs of the student. During this time period, the classroom teacher will collect additional data in relation to how the interventions impact the student's learning. An additional member of the RTI team will observe the struggling learner in the classroom setting and collect quantitative and qualitative data accordingly. Following the application of the interventions, the RTI team will reconvene. We will then determine the impact of the intervention and make an informed, data-driven decision as to whether further interventions are applicable or if academic, psycho-educational, or neuropsychological evaluation is needed. If this level of testing is recommended, our team will then obtain consent from the family and secure an outside provider from the community to conduct this assessment.

2. Students Learning English

Ida Lewis Leadership Academy will ensure full compliance with the applicable state and federal laws pertaining to English Language Learners (ELLs) including the Equal Education Opportunity Act of 1974, Title VI of the Federal Civil Rights Laws, Rhode Island General Law 16-54 and Title III of the No Child Left Behind Act. Through ongoing job-embedded professional development, our faculty will be well versed in these laws and they will be responsive to the needs of our ELL population. Our faculty will refer to the April, 2011 document from RIDE entitled *Guidance Concerning Identification and Enrollment Procedures for ELLs* to inform how

we identify our English Language Learners. A Home Language Survey will be given to all of our new families followed by a face-to-face interview. In the event that there are families who indicate that another language is spoken at home, we will administer the ACCESS® test to determine the student's level of English proficiency and build a program that is tailored to each student's needs. We will also monitor students' progress over time by administering the ACCESS® test twice annually. In order to be discharged from our English Second Language (ESL) program, students must meet one of the following criteria: achieve a literacy composite score greater than or equal to 4.5 on the ACCESS®, achieve a comprehension composite score greater than or equal to 5.0 on the ACCESS®, achieve a speaking proficiency level score above the district-established minimum, achieve proficiency or above on the NECAP, or achieve passing grades in one or more core subjects. Our certified ESL teacher will work collaboratively with our special education teacher to ensure that ELLs are not over or under-identified and to tease out whether a child's language deficiencies are caused by a language disability.

Once students qualify for ESL services, an individualized plan with a heavy emphasis on academic language development will be developed based on the student's level of need. Our certified ESL teacher will build an instructional program that is tailored to the student's needs and aligned to the World-Class Instructional Design and Assessment (WIDA) Standards. The *2012 Amplification of the ELD Standards, Kindergarten–Grade 12* will also be used as a resource to design instruction. Additional research-based strategies will be drawn from *English Language Learners: The Essential Guide* (Freeman & Freeman 2007). Depending on the student's level of need, services will either be provided in the classroom or outside the classroom in a small group or one-on-one format. Our ESL staffing will be determined based on the amount of students who qualify for services. Alternatively, we will encourage all of our teachers to pursue ESL endorsements and partial tuition reimbursement will be provided to teachers who enroll in ESL courses.

As part of our comprehensive professional development plan, all of our teachers will participate in Sheltered Instruction Observation Protocol (SIOP) training delivered by RIDE personnel. This weeklong training will take place during the summer and teachers from neighboring districts will be invited to participate. The Building Administrator will then conduct ongoing classroom observations to ensure that SIOP strategies are being implemented in our classrooms. We will also measure the success of our ESL program by the longitudinal growth of our ELL students and feedback from our families.

In accordance with the above-referenced state and federal laws, we will ensure that our ELLs have equal access to all academic and non-academic programs including extracurricular activities. All written documents and materials disseminated by Ida Lewis Leadership Academy will be translated so parents can be informed and engaged. Finally, parents of ELLs will be invited to join our *Parent Advisory Council* that will meet four times annually. The purpose of this Council will be to provide parents with support, guidance, and strategies to enhance our ELLs learning.

Students with Disabilities:

Ida Lewis Leadership Academy will provide a comprehensive special education program that is in full compliance with the *Individuals with Disabilities Act (IDEA)* (2004) and the *Rhode Island Board of Education Regulations Governing the Education of Children with Disabilities*

(2013). We will ensure that all students, regardless of their abilities or disabilities are provided with a quality education. We will recruit and hire a diverse staff that is ideally, dually certified in regular education and special education. We will also be looking for teachers who are certified in research-based intervention programs such as Wilson and/or Orton Gillingham. By having this level of expertise on our staff, we will be able to close achievement gaps and provide a supportive learning environment where all students succeed.

The procedures used to identify students with disabilities will align with the Rhode Island Board of Education Regulations. Once a child navigates through the Response to Intervention (RTI) system and still demonstrates a learning deficiency, a referral will be made to conduct additional standardized testing to determine whether there is a learning disability. An intelligence test such as the Wechsler Intelligence Scale for Children (WISC) as well as a neuropsychological test will be administered to determine eligibility for special education services. If the team makes the determination that the child qualifies for special education services based on the data, an Individualized Education Program (IEP) will be developed. Members of the team will include the classroom teacher, the parent, the Executive Director, the special educator, and the applicable therapist(s) (speech, occupational therapy, or psychologist). The type of services and the delivery of services will be determined by the intensity of the student's needs. However, to every extent possible, services will be delivered in the least restrictive environment.

In the event that there are significant learning deficiencies, particularly in the area of reading, services and interventions will be provided in a small group or one-on-one setting outside the classroom. Our special education staff will draw from the following research-based programs that are currently being used at Paul Cuffee School:

- Lively Letters - multi-sensory mnemonic letter card program
- Elkonian Word Boxes
- Word Journeys- assessment- guided phonics and spelling instruction
- GLASS ANALYSIS for decoding only – remedial support
- Orton Gillingham - strategies and techniques - remedial support
- Reading Milestones - alternative reading program for hearing impaired and ELLs
- Readers Theater- multi- level differentiated fluency skills program
- Explode the Code workbooks – strengthens visual perception, provides daily practice
- LEXIA - Phonics based reading- computer program instructional practice for K-2, remedial 3-5
- Reading Recovery
- Tumble Books – online read-along stories
- IXL.com

There will be ongoing collaboration between regular education teachers and the special education team during common planning time. Classroom teachers will be required to sign-off on the modifications noted on each IEP, indicating that they have full knowledge of the child's needs and will follow the IEP with fidelity. We will strive to cultivate a partnership with Roger Williams University. As a result of this partnership, our school will evolve into a "professional development school" in which there is ongoing, job-embedded professional development

provided to our faculty to ensure that we are equipped with the necessary skills and knowledge to meet our students' individualized needs.

Our special education staffing levels will be determined by our student enrollment. In the event there is an increase in students with special needs, we will hire the necessary qualified and certified professionals to meet these students' needs. Given the small student enrollment of our school, we will secure independent contractors to provide services such as physical therapy, occupational therapy, speech therapy, and counseling. Partnerships with local social service agencies such as Child and Family Services will provide us with access to community resources that will further support our students with special needs.

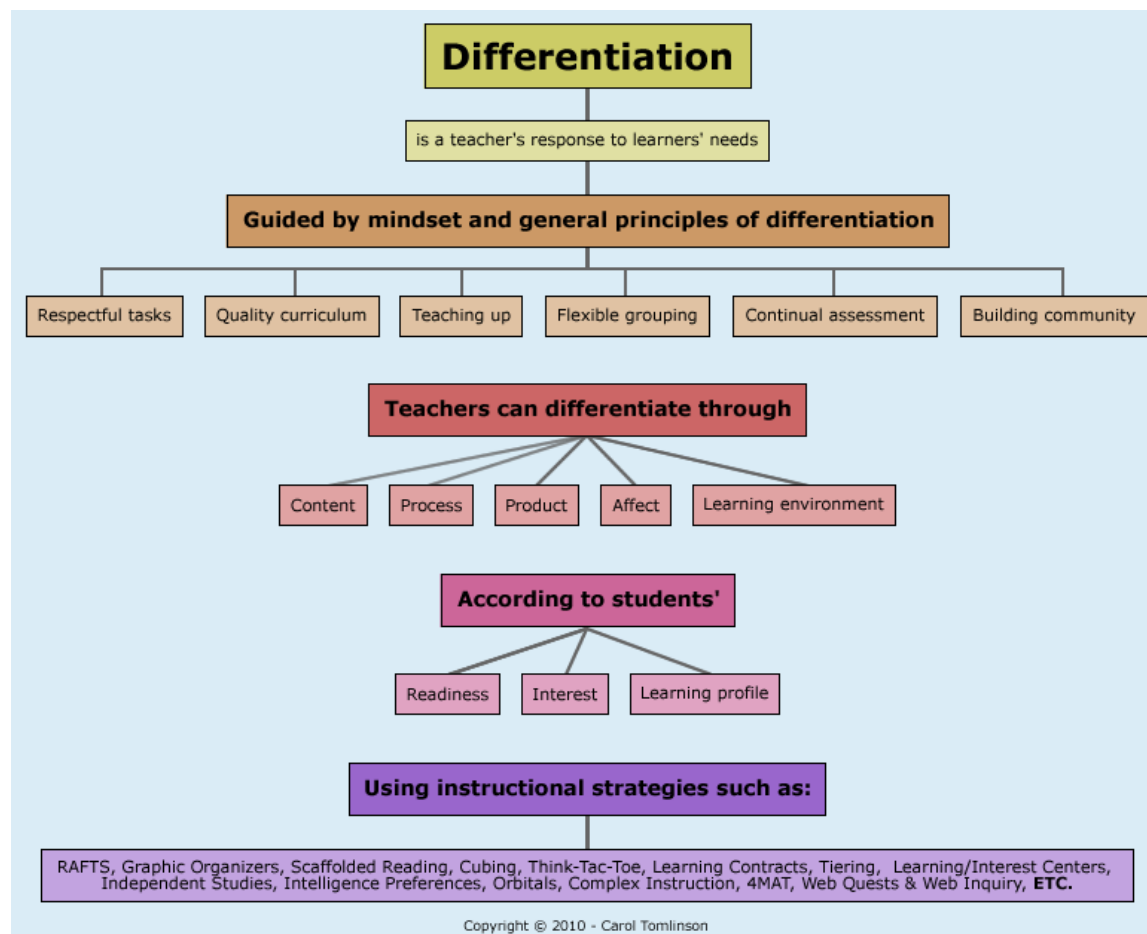
We will ensure that parents of students with special needs are actively engaged and supported. In addition to being provided with access to Rhode Island Parent Information Network (RIPIN) and being provided with the RI Special Education Procedural Safeguards following each IEP meeting, these parents will be invited to participate in the Ida Lewis Leadership Academy Parent Advisory Council for Parents of Students with Special Needs. Guest speakers from the community will offer workshops on topics identified by this group of parents. Parents will also be provided with numerous opportunities to evaluate the effectiveness of our special education program through surveys and face-to-face interviews with our special education team. The data collected from these surveys and interviews will be used to make informed decisions in improving our program. All members of the Ida Lewis team will be expected to make the necessary changes to further enhance our program. The ultimate measure of success of our special education program will be the academic and socio-emotional growth of our students with special needs and the decreased achievement gaps.

The most unique aspect of our special needs program will involve weekly visits from a certified therapy dog. We will collaborate with a local certified therapy dog trainer in arranging these weekly visits to support our students with physical, emotional, or psychiatric impairments as well as students with developmental disabilities. The goal will be to improve social responsiveness and interactions, alleviate distress, and build confidence amongst our students with special needs. Researchers have conducted many studies of the positive effects of animals in therapeutic situations (Hansen et al. 1999), (Eddy, Hart and Boltz 1987), (Kaminski, Pellino and Wish 2002). Additionally, one of our founders, Wendy Randle witnessed firsthand the positive impact that animals had on students' emotional growth and interpersonal interactions at a charter school in South Carolina. In this particular situation, students had the opportunity to read to dogs that were brought into the school on a weekly basis. Ms. Randle was astounded at the calming effect that these dogs had on students. We intend to make this opportunity available to children whose parents or guardians grant permission and those who would not be adversely affected by exposure to animal fur or hair.

Gifted or Advanced Students:

The founders of Ida Lewis Leadership Academy recognize that the learning needs of gifted students differ from those of other students and should be addressed through differentiation of the content, process, and product. Moreover, appropriate modifications to the curriculum should be made in accordance with students' individualized interests and achievement. The provision of challenging learning experiences that are appropriately tailored to the unique needs and interests of gifted students requires differentiation that includes the

following: accelerated instruction, in-depth study of content, and the selection of content of greater complexity (NAGC 1994). In order to meet the unique needs of our gifted population, the teaching staff at Ida Lewis Leadership Academy will be trained using Tomlinson's (2010) differentiation model depicted below:



Flexible grouping is another vehicle that provides gifted children with access to learning experiences that are more complex and rigorous (Loveless, 1998; Rogers, 2006; Tieso, 2003). The configuration of flexible groups also affords gifted children opportunities to connect with peers who are on the same cognitive level. Flexible grouping will be used at Ida Lewis Leadership Academy during the literacy block to ensure that students are reading texts that are appropriately matched to their developmental reading levels. When necessary, students reading above grade level as measured by Fountas and Pinnell's developmental reading continuum (2010), will visit classrooms in higher grades during the literacy block so they will be exposed to content that is more challenging and complex.

Section IV(e). Assessment System

The faculty at Ida Lewis Leadership Academy will collect multiple sources of data throughout the year so teaching and learning can be closely monitored and maximized. Students will each have their own electronic portfolio where their achievement data is uploaded, stored, and tracked longitudinally. Our teachers will be trained in the administration

of formative assessments and summative assessments and they will have a clear understanding of *assessment for learning* versus *assessment of learning*. In accordance with the Rhode Island Model Teacher Evaluation and Support System, teachers will be required to embed some type of assessment in each one of their lessons. Teachers will also decide the frequency and duration of formative and summative assessments and an Assessment Schedule will be developed on a yearly basis. Teachers will also be trained in using formative assessment data to make informed instructional decisions.

In addition to the assessments referenced in the table below, our Curriculum Development Team will make informed decisions in relation to other assessments that are needed to monitor teaching and learning. Our primary objective will be to ensure that there is a clear alignment between the content that is taught in our classrooms and the assessments that are being used to measure students' learning.

The Data Cycle of Inquiry will be used to examine student performance data on a regular basis. Our School Data Leadership Team (SDLT) will meet regularly to examine student achievement data, identify patterns of need and make informed decisions about curriculum, instruction, and professional development. The Executive director will share student achievement data with the Board on a regular basis. Furthermore, data gathered during informal and formal classroom observations will be used to draft a comprehensive professional development plan that will in turn improve teaching and learning

Proposed Assessments

Math	Balanced Literacy	Inquiry-based Science	Multicultural Studies	World Language	STEM	Creative Arts	Physical Education, Health & Wellness
K-8: <i>Math in Focus</i> Chapter & Unit Tests 3-8: RIDE Interim Assessments 3-8: NECAP Release Items 3-8: PARCC 3-8: Terra Nova (National Assessment) K-8: Benchmark formative assessments created by teachers	K-8: Fountas & Pinnell Benchmark System (thrice annually) K-8: Rigby Running Records (twice annually) K-8: 5-Minute Reading Assessments (Monthly) 3-8: PARCC 3-8: Terra Nova (National Assessment) K-2: Phonological Awareness System (PALS)	3-8: Science NECAP Release Tasks 3-8: School Developed Benchmark Assessments K-8: Science Notebook Entries	K-8: Projects 3-8: Teacher created formative assessments aligned to the content 3-8: Student Reflections K-8: Teacher-created formative assessments	3-8: Language Proficiency Tests K-2: Performance Tasks	K-8 Projects K-8 Teacher-created formative assessments	K-8: Musical and Theatrical Performances Self-assessments	K-8: National Fitness Assessment K-8 Pre and post teacher-created performance assessments 2-8: Fitness Journals 2-8: School-Developed Health & Wellness Assessments

**Ida Lewis Leadership Academy
Draft Assessment Calendar
2015-2016**

Type	Administration Window	Assessment	Grades
Local Pre-test	August –September 2015	PALS	K-2
Local Post-test	May - June 2016		K-2
Local Pre-test	August - September 2015	Inquiry-based Science Performance Assessment	K-8
Local Mid-year	January 2016		K-8
Local Post-test	May 2016		K-8
National Standardized	March 2016	Terra Nova 3 rd Edition Multiple Assessments	3 - 8
Local Pre-test	October 2015	6 Traits Writing Assessment	K-8
Local Mid-year	January 2016		K-8
Local Post-test	May 2016		K-8
Pre-test	October - 2015	BAS	1-8
Post-test	May 2016		1-8
Local Pre-test	September 2015	Math Problem Solving Assessment	K-8
Local Mid-year	January 2016		K-8
Local Post-test	May 2016		K-8

Section IV (f). Promotion and Graduation Policy

In order to be promoted to the next grade level, students will be required to demonstrate proficiency in the following sets of standards: Common Core Standards, Next Generation Science Standards, the International Society for Technology in Education (ISTE®) Standards, the American Association of School Librarian Standards for the 21st Century Learner, Framework for 21st Century Skills and the National Standards for K-12 Physical Education. Our Curriculum Development Team will design a 4-point standards-based report card that includes

language from the above-referenced standards. Students will receive report cards at the end of each trimester and progress reports in the middle of each trimester. Using the website: <http://www.thecurriculumcorner.com> teachers will develop student-friendly “I can” statements that are aligned to the language in the Common Core Standards. This tool will be used during one-on-one conferences with students to actively involve them in the formulation of learning goals and provide meaningful opportunities for students to reflect on their own growth in accordance with the process of experiential learning.

In the event that students are at-risk for retention, parents will be notified by February. They will be required to schedule a conference with the teacher and the Executive Director of Ida Lewis Leadership Academy and a clear data-driven rationale for retention will be provided at this time. We will involve the parents in the decision by having them complete the Light’s Retention Scale. Teachers will also complete this scale and results will be analyzed accordingly.

Section IV (g). School Culture

Ida Lewis Leadership Academy will be a vibrant learning community where students and staff are intellectually stimulated, socially engaged, and inspired to make a difference in the world. In the spirit of Ida Lewis’s life and her humble abode, Limerock Lighthouse, Ida Lewis Leadership Academy will be a beacon of hope. One of our community outreach partners, Alex and Ani, offer a vivid and eloquent description of a lighthouse: “A lighthouse is a welcoming structure, a reassuring sign of steady ground ahead, and an optimistic symbol of hope for all looking to move forward safely. It is an emblem of strength located at the edge of unpredictable tides as it provides navigational guidance and bright light in a storm. Resilient and immovable, this shining beacon encourages perseverance even in the darkest times” (alexandani.com). Ida Lewis Leadership Academy will be a safe, peaceful, welcoming and caring, student-centered environment where children are valued and cherished.

We will cultivate a school culture of engagement, empowerment and achievement through the implementation of *The Leader In Me* process. *The Leader in Me* process is based on Stephen Covey’s *Seven Habits of Highly Effective People* (1989). Dr. Stephen Covey is one of the most influential personages across the globe in relation to leadership research and development. The *Seven Habits of Highly Effective People* have been used in higher education, corporate America, and are gaining increasing popularity in elementary, middle, and secondary education over the past 15 years. There are also approximately 1,600 *Leader in Me* Schools across the world. These schools have pledged their commitment to infusing the *7 Habits* into the very fundamental premise of the school culture. As a result of implementing this process with fidelity, schools around the world have experienced higher student achievement, lower discipline referrals, fewer incidents of bullying, improved staff morale and enhanced family and community engagement. Ida Lewis Leadership Academy will be the first school in Rhode Island to formally adopt *The Leader in Me* process and we will welcome educators and educational leaders from other schools to witness this process in action.

The founders of Ida Lewis Leadership Academy consulted with several educational leaders from Maine, Massachusetts, New Jersey and New York and we visited three schools in New York that are currently implementing *The Leader in Me* process. Administrators from the above-reference states provided a glowing review of *The Leader in Me* process. We were told that *The Leader In Me* has transformed their schools by cultivating a culture of achievement,

engagement, and empowerment. Students play an integral role in formulating and recording their own goals for improvement in their leadership journals. Teachers model the *7 Habits* and there is a common language woven through the culture of the school. Families are engaged in learning about the *7 Habits* and they apply these habits at home. Finally, community stakeholders are directly involved in promoting the *7 Habits* and sharing testimonies about how the *7 Habits* contribute to their success. Below is an image that depicts the *7 Habits*:

Seven Habits of Highly Effective People*

- **Be proactive**
- **Begin with the end in mind**
- **Put first things first**
- **Think win–win**
- **Seek first to understand,
then to be understood**
- **Synergize**
- **Sharpen the saw**

* Stephen Covey, (1989). **The Seven Habits of Highly Effective People.**

We decided to adopt *The Leader in Me* process for several reasons. First and foremost, *The Leader in Me* is aligned to the Common Core State Standards and the 21st Century Skills Framework. Our decision to adopt *The Leader in Me* process was also based on the fact that most social and emotional learning programs evaluated recently by CASEL (2013) do not have an impact in the community context. In contrast, *The Leader in Me* has been shown to have a profound influence on communities. In fact, there are many meaningful opportunities for community stakeholders to become part of the implementation process. By implementing *The Leader in Me* process at Ida Lewis Leadership Academy from the moment our doors open, we will begin to engage community stakeholders in the process of using the *7 Habits* to transform our community. For example, community stakeholders will be invited to Ida Lewis Leadership

Academy on a regular basis to learn about the 7 Habits and learn how these principles can be applied to their everyday lives. Our student ambassadors and faculty will facilitate these informational sessions. Community stakeholders will also be invited to leadership events at Ida Lewis Leadership Academy. During these events, our students and staff will showcase their application of the *7 Habits* through a variety of vehicles such as plays, skits, musical performances, and Socratic seminars in which the *7 Habits* are connected to authentic pieces of children's literature. In addition to opening our doors as a *Leader In Me* School, we will honor our namesake by achieving "Lighthouse Status" by the third year of our operation. To achieve "Lighthouse Status," *Leader in Me* schools must showcase their leadership skills, implement the process with fidelity, and meet expectations based on the following criteria: Establishment of a Lighthouse Team, Staff Collaboration, Family & Community Engagement, Leadership Environment, Leadership Instruction & Curriculum, Student Leadership, Leadership Events, Goal Setting & Tracking, and Measurable Results.

In addition to adopting the *Leader in Me* process as the foundation of our interconnected student and adult culture, the founders of Ida Lewis Leadership Academy will continuously monitor and enhance our school's climate and culture. We recognize how a positive school culture impacts teaching and learning. Our knowledge of school culture is grounded in research and a wide variety of experiences in schools across our country as well as abroad. We define school culture as the collective values, beliefs, commitments, and behaviors demonstrated at a school, as well as the attitudes and relationships that influence and shape how a school operates. In addition to having a profound impact on teaching and learning, the school culture impacts the attainment of the school's mission. The adults and children of Ida Lewis Leadership Academy will have a deep understanding of our mission through meaningful and purposeful classroom and beyond-the-classroom experiences as well as rituals that are embedded into our day-to-day operations. Our school mission statement will be displayed prominently in our corridors and throughout our classrooms. We will ensure that students and adults are able to articulate how their behaviors, attitudes, beliefs, and values are reflective of our mission.

According to research conducted by Hobby (2004), the following "reinforcing behaviors" have the potential to enhance school culture: Rituals, Hero Making, Storytelling, Symbolic Display, and Rules. We will incorporate this research into our culture-building activities. For example, we will host monthly town meetings in which learning and leadership are showcased. We will also host ceremonies to commemorate our namesake. We believe in the importance of coming together as a community to celebrate our student and staff successes, share our learning, and expand our knowledge of our namesake's extraordinary life. Weekly whole-school meetings will help us build our culture and bring cohesion to our community. During these weekly meetings, we will recognize students and adults who have demonstrated the core values of our school as well as the *7 Habits*. We will also develop a repertoire of songs that we will sing together. Songs are powerful vehicles for bringing cohesion to a school. For example, in the spirit of Ida Lewis's life, we will sing, *This Little Light of Mine*. This song will be symbolic of our commitment to creating an environment in which everyone shines.

We will also host an annual school play that is based on the life of Ida Lewis. Students in the upper elementary grades will work collaboratively to write the script and create the props

and scenery. Stakeholders from the community including our board members as well as board members from Ida Lewis Yacht Club will be invited to behold the talents of our students.

Ida Lewis Leadership Academy's founders will work diligently with all stakeholders to cultivate a student-centered culture, in which the needs of our children are at the forefront of everything we do and there are high expectations for everyone. Professionalism and collegiality will be the norms of adult interactions. Furthermore, the adults at Ida Lewis Leadership Academy will be expected to *lead by example* and demonstrate behavior that is conducive to caring and respectful relationships. The founders of Ida Lewis Leadership Academy understand how adult relationships impact student learning. Thus, we will keep a steady pulse on the quality of relationships within our organization through the ongoing collection of qualitative and quantitative data. A teacher-created climate survey will be administered on an annual basis and the data gleaned from this instrument will be shared with the entire community in the interest of transparency. Subsequently, the faculty will be expected to work collaboratively in developing a plan to improve climate and culture.

In order to further build trust and strengthen our culture, our team of educators and family members will be empowered through shared decision-making. We will actively involve our faculty and family stakeholders in non-personnel related decisions such as the development of curriculum, the adoption of new programs and matters pertaining to the day-to-day operations of our organization. For example, we will actively engage teachers and prospective parents in drafting a school discipline policy. We will examine a variety of discipline policies from other schools and collaboratively determine the appropriate language to be incorporated into our discipline policy. The *7 Habits* will provide a foundation for maintaining a safe environment and managing student behaviors. We will also involve a diverse group of stakeholders including teachers, parents, and local law enforcement representatives in developing a comprehensive School Emergency Operations Plan. The *Guide for Developing High-Quality School Emergency Operations Plans* (FEMA 2013) will be used to craft the Ida Lewis Leadership Academy School Emergency Operations Plan.

Section V (a). Establishing Persons or Entities

The Establishing Entity for Ida Lewis Leadership Academy will be the Rhode Island Urban League. Founded in 1939, the Rhode Island Urban League is a community-based non-profit tax-exempt organization whose mission is to eliminate racial segregation and discrimination. The Rhode Island Urban League's Board of Trustees and the Founders of Ida Lewis Leadership Academy share the same passion of seeking equality for minorities and those who are economically disadvantaged. Both organizations are committed to enabling people who are traditionally underserved to demonstrate their full potential as productive community members and leaders who leave behind a legacy. We both believe in the importance of empowering community members to make a positive impact on the world. The Executive Director of the Urban League and the Executive Director of Ida Lewis Leadership Academy are committed to cultivating a synergistic partnership that will be mutually beneficial to both organizations. In the event that Ida Lewis Leadership Academy's Charter Proposal is approved, we plan to establish a Rhode Island Urban League satellite office within our facility. Rhode Island Urban League staff will be invited to attend our professional development on the 7

Habits of Highly Effective People (Covey, 1989). We will also offer parenting workshops and adult education opportunities in collaboration with the Rhode Island Urban League. Our ultimate goal will be to educate, empower and inspire our stakeholders to be productive citizens and leaders within the community at large.

The Rhode Island Urban League will work collaboratively with the Executive Director, the Financial Officer and Board of Trustees of Ida Lewis Leadership Academy to ensure that Ida Lewis Leadership Academy remains a financially sustainable and viable organization. We will also join forces in our strategic planning efforts to ensure that we maintain our philosophical alignment moving forward.

Section V (b). Applicant Group

We are confident that members of the applicant group have the necessary leadership skills, competencies, experience, knowledge and expertise to successfully launch and operate a charter school. These individuals also exemplify the core values of courage, compassion, respect, and determination referenced in the mission statement of Ida Lewis Leadership Academy. The individuals who comprise the applicant group (with the exception of Belinda Francis, Michelle Casey, Michael Corcoran and Tomma Botelho) originally crossed paths while serving in educational leadership capacities at Paul Cuffee School. The founder and proposed Executive Director, Wendy Randle, currently serves as the Interim Head of School at Paul Cuffee School in Providence, RI. For the past nine years, Ms. Randle has served in educational leadership capacities in the states of Massachusetts, South Carolina, and Rhode Island. Ms. Randle began her career in education as a first grade teacher in Newport and that community is where her heart remains. Mary Caporelli, an educational consultant who has served in a variety of educational leadership roles throughout Rhode Island will assist with the academic program development, recruitment of staff, and the selection of research-based best practices at Ida Lewis Leadership Academy. In addition to leading our professional development initiatives, Ms. Caporelli will also serve on our Board of Trustees and she will be our creative arts coordinator. She will provide direct, explicit instruction in each domain of creative arts, and she will recruit community members to further enrich our creative arts program. Victoria Tolbert-Bravo currently serves as the Dean and Spanish Teacher at Paul Cuffee Middle School. Ms. Bravo will be charged with developing the scope and sequence for our foreign language program and she will serve on the Board of Trustees. Tomma Botelho is currently employed at Home Loan Investment Bank in Warwick, Rhode Island. In addition to serving on the Board of Trustees, Ms. Botelho will function as a financial advisor for the Executive Director. Given Ms. Botelho's wide range of experience in the finance industry, she brings a lot of knowledge and expertise to the Ida Lewis Leadership team. As reflected in Michael Corcoran's resume, he has a wide range of experience in finance and human resources. In addition to serving on our Board of Trustees and potentially serving as our part-time Finance Officer, Mr. Corcoran will assist with the development of human resource policies and procedures and the cultivation of community partnerships. Ms. Michelle Casey is currently employed as a Client Partner for FranklinCovey Education. In addition to serving on our Board of Trustees, Ms. Casey will be responsible for launching *The Leader In Me* program from the moment our doors open. She will train our faculty in the *7 Habits* and she will ensure that this program is implemented with

fidelity and sustained over time. Dr. Susan Pasquarelli is a resident of Newport and professor from the Education Department at Roger Williams University. Dr. Pasquarelli brings deep knowledge of research-based best practices in literacy instruction, extensive grant writing experience, and a clear understanding of what Newport needs in relation to educational programs and opportunities. Dr. Pasquarelli will assist with the development of our literacy program and she will serve on the hiring team. Finally, Michael Obel-Omia is currently the Executive Director at Compass School, which is the top performing charter school in Rhode Island. Given the fact that Compass and Ida Lewis have a similar size student enrollment and educational philosophy, Mr. Obel-Omia will assist the Executive Director of Ida Lewis with the formulation of the annual budget, program development, and institutional advancement for Ida Lewis Leadership Academy. Mr. Obel-Omia will also serve on the Board of Trustees for Ida Lewis Leadership Academy.

Section V (c). Board Development and Duties

The Board of Trustees will ensure that Ida Lewis Leadership Academy attains its mission and engages in the process of continuous school improvement. The composition of our Board of Trustees will be diverse and reflective of the population we serve. The members of our Board will also possess a wide range of skills, knowledge, and expertise and be representatives from a variety of sectors within the community. For example, in addition to recruiting individuals who have proven experience in the field of K-12 education, our Board will comprise of community stakeholders and leaders who have background in law, finance, marketing, real estate, public relations, fund raising, human resources, institutional advancement, technology, higher education, and non-profit organizational management. Upon the authorization of the school's charter, we will assess our existing Board composition to determine which areas of expertise are needed and we will advertise for these Board positions in local newspapers. We will also invite key stakeholders from the community to visit our school and interact with our learners during family engagement events. This will afford us the opportunity to recruit member for our Board who share our philosophical beliefs about education.

Our diverse Board of Trustees will be well equipped to perform its roles and responsibilities in accordance with RIGL§16-2-9, the Rhode Island Public Meetings Law 16-42-46 and the RI Ethics Commission. With the support of our Legal Counsel, our Board will demonstrate a deep understanding of the Rhode Island state laws and regulations and the federal laws and regulations that govern charter schools. Our Board will ensure that Ida Lewis Leadership Academy remains in full compliance with the applicable state and federal laws and regulations. Members of our Board will participate in annual training in board governance, accountability, and the renewal process and they will develop a clear understanding of their fiduciary responsibilities to our organization. Upon the authorization of our charter, our Board of Trustees will assume the following roles and responsibilities:

- Develop a comprehensive institutional advancement program that includes an annual fund, a public relations and community outreach plan, and a marketing plan
- Monitor the academic progress of our scholars in collaboration with our Executive Director and our Educational Consultant
- Identify educational and operational needs of our school

- Evaluate the overall performance of our school
- Formulate human resource, personnel and financial policies for our organization
- Provide an assurance of compliance to state and federal laws that govern charter schools and non-profit organizations
- Approve the annual school calendar
- Define and refine academic and operational goals for our school
- Approve the annual school budget
- Engage in fiscal oversight of our school
- Employ and evaluate our Executive Director
- Provide advice and guidance to our Executive Director
- Hear appeals from disciplinary actions
- Establish an equitable process by which teachers and parents can challenge the Board's decisions
- Establish policies governing curriculum and programs of study
- Approve and execute contracts in relation to transportation, food services, and maintenance
- Adopt policies that address the safety, health, and wellbeing of our students and employees
- Participate in 6 hours of annual Board training
- Attend four annual Board meetings as well as a reasonable amount of school-sponsored events
- Serve as a member of one of the following Board committees: Finance and Facilities, Institutional Advancement and Public Relations, and Human Resources

The Executive Director will ensure that the Board of Trustees is well informed of matters pertaining to the fulfillment of our mission and the continuous improvement of teaching and learning. Following each cycle of state assessments, the Executive Director will present the student achievement data to the Board as well as release items from the test to familiarize the Board with the level of rigor and the high expectations that we hold for our scholars. Following each data presentation, the members of the Board and the Executive Director will engage in a brainstorming session to determine actions steps need to improve academic achievement. In addition to sharing student achievement data with the Board, the Executive Director will present parent and student satisfaction data gleaned from the Survey Works instrument. This perception data is equally as important in the process of continuous school improvement.

The Board will engage in ongoing fiscal oversight during each of its four annual meetings as well as during the four Finance and Facilities Committee meetings that take throughout the course of each fiscal year. There will be several Board members with an extensive finance background who will support and guide the Executive Director in making fiscally sound decisions that contribute to the financial sustainability of our organization. The Board will also be responsible for evaluating the Executive Director with a mutually agreed upon comprehensive evaluation instrument. This evaluation process will involve the Executive Director in formulating 3-5 measurable goals. Twice annually, the Executive Director will be

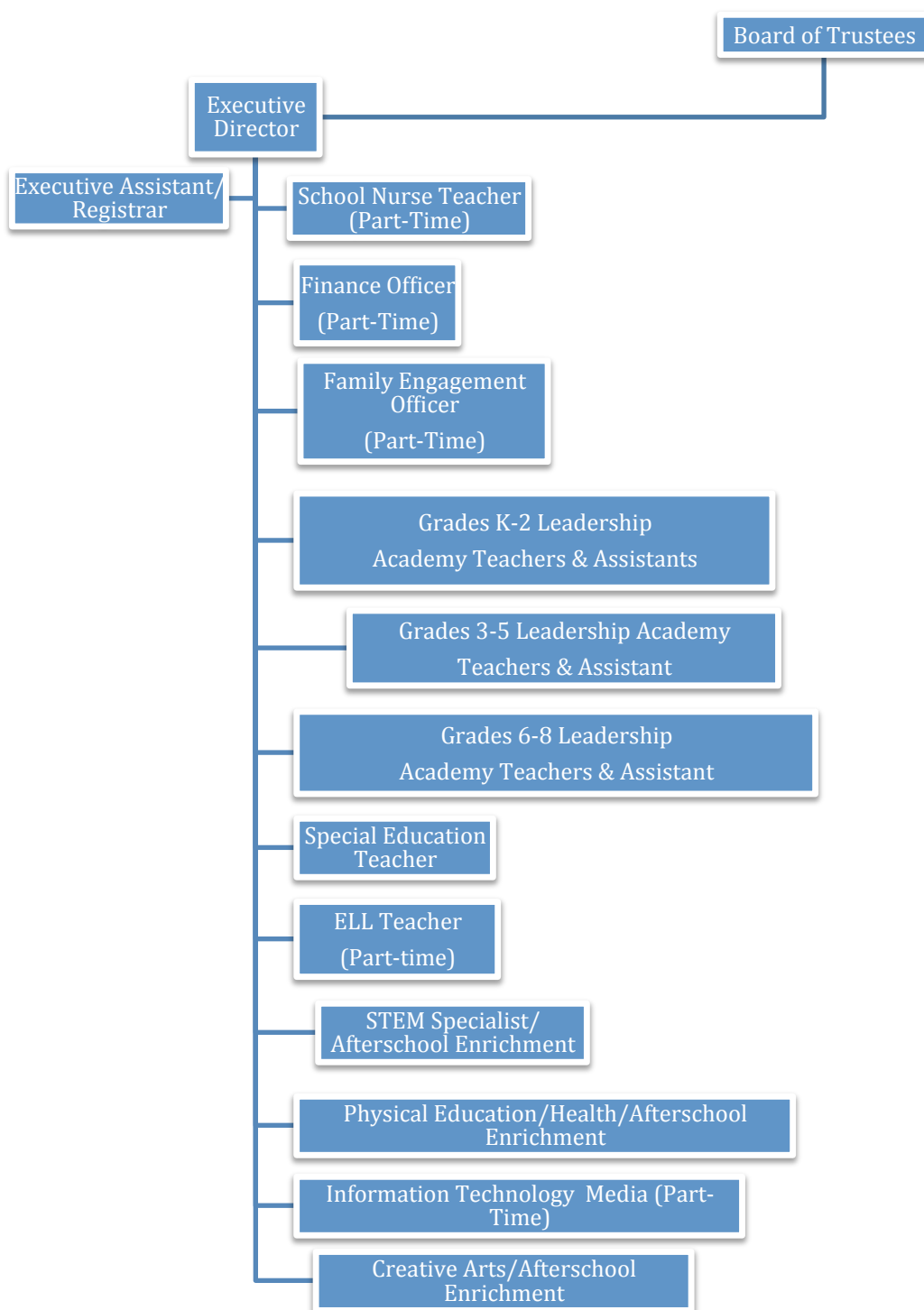
required to submit a written reflection that articulates the extent to which these goals have been attained. These reflections will also include evidence of goal attainment. Another very important facet of the evaluation process will involve a 360-degree process in which each member of the Ida Lewis Leadership Academy faculty will have the opportunity to provide specific feedback to the Executive Director in relation to strengths and opportunities for improvement. A final component of the Executive Director's evaluation process will involve the Board members interviewing members of the faculty to assess the Executive Director's educational leadership competencies.

The following table reflects the composition of the Board, areas of expertise, and the proposed roles:

Name	Position/Role	Area of Expertise	Affiliation to Applicant Group
Wendy Randle	Ex Officio Member of the Board and Executive Director	Educational Leadership	Executive Director
Tomma Botelho	President	Finance, Marketing & Philanthropic Outreach	Community Outreach
Mary Caporelli	Vice-President	Educational Leadership, Curriculum Development & Grants	Educational Consultant
Michelle Casey	Clerk/Secretary	Educational Marketing & Sales	FranklinCovey Client Partner
Michael Corcoran	Treasurer	Finance, Human Resources & Sales	Human Resource Advisor & Potential Finance Officer
Michael Obel-Omia	Board Member	Educational Leadership, Institutional Advancement and Grants	Grant Consultant
Susan Pasquarelli	Board Member	Literacy Curriculum Development, Grants & Professional Development	Potential Higher Education Partner
Victoria Tolbert-Bravo	Board Member	Foreign Language Curriculum Development, Educational Leadership, & Grants	
ILLA Parent	Board Member	Legal expertise	Lawyer

Section V (d). Personnel Structures (Organizational Chart and Staffing Chart)

The following is the organizational chart for Ida Lewis Leadership Academy:



Ida Lewis Leadership Academy 5-year Staffing Plan

Ida Lewis Leadership Academy Faculty & Staff Positions	Year 1	Year 2	Year 3	Year 4	Year 5
Executive Director	.5	5	.5	.5	.5
Principal	.5	.5	.5	.5	.5
Executive Assistant/Registrar	1	1	1	1	1
Finance Officer	.5	.5	.5	.5	.5
Grades K-2 Teachers	3	3	3	3	3
Grades 3-4 Teachers	2	2	2	2	2
Grades 5-8 Teachers (Each teacher will have a Middle School Endorsement in one of the following content areas: English Language Arts, Mathematics, Social Studies or Science)		1	2	3	4
ELL Teacher	.5	.5	.5	1	1
Special Education Teacher	1	1	1.5	1.5	2
Family Resource Coordinator	.5	.5	.5	.5	.5
School Nurse Teacher	.5	.5	.5	1	1
Physical Education Teacher/Health Teacher/Afterschool Enrichment	.75	.75	.75	.75	.75
STEM Specialist/After School Enrichment	.75	.75	.75	.75	.75
Creative Arts/After School Enrichment	.75	.75	.75	.75	.75
Library Media Technology Teacher	.75	.75	.75	.75	.75
Educational Assistant	4	4	4	5	5

*The following services will be provided by outside independent contractors: educational consulting, legal counsel, accounting & bookkeeping, janitorial, speech pathology, occupational therapy, physical therapy, psychological testing, counseling, and information technology support.

Section V (e). Leadership

The leadership team at Ida Lewis Leadership Academy consists of the Executive Director, the Executive Assistant, the part-time Finance Officer, The Family Engagement Officer, the Educational Consultant, and Technology Consultant. This team will meet on a weekly basis to examine the efficiency and effectiveness of our educational programs as well as other operational facets of our organization. We will also ensure that all of our programs are aligned to our mission statement. Job descriptions for the Executive Director and the Educational Consultant are included in the Appendix of this document. We have also included resumes of the proposed Executive Director, the part-time Finance Officer, and the Educational Consultant.

The following is a brief description of the leadership team members' roles and responsibilities:

Executive Director – The Executive Director is responsible for serving as the liaison with the Board of Trustees, overseeing all of the operations and management of the school, and providing educational leadership in relation to the ongoing improvement of teaching and learning. The Executive Director will perform all of the typical roles of a Superintendent as well as a Principal.

Executive Assistant – The Executive Assistant will support the Executive Director in all facets of the school's operations including public relations with all stakeholders, assisting with the planning and coordination of events, managing the school calendar and interfacing with the Rhode Island Department of Education as well as other community agencies.

Finance Officer – The part-time Finance Officer will be responsible for managing the school budget, ensuring fiscal responsibility and sustainability, and coordinating outside contracting services in relation to maintenance and repairs of the facility.

Family Engagement Officer – The part-time Family Engagement Officer will be responsible for connecting families with community resources, planning and coordinating monthly family engagement events, cultivating community partnerships to enhance educational programs, and supporting teachers by aligning the school's needs with our parents' and community stakeholders' unique skills and talents.

Educational Consultant – The part-time Educational Consultant will be responsible for collaborating with the teaching faculty in developing and refining the curriculum, coordinating peer mentoring opportunities, and developing a repertoire of research-based best practices to improve teaching and learning.

Technology Consultant – The part-time Technology Consultant will be responsible for the planning, implementation and upkeep of the IT system of the school in addition to empowering teachers to troubleshoot issues associated with the use of technology in the classroom and collaborating with the teachers in enhancing their ability to integrate technology into their instruction. This person will also provide ongoing technology support in relation to hardware, software, and networking.

The above-referenced members of the leadership team will also perform duties associated with the recruitment and retention of a diverse, certified, and highly qualified teaching faculty. Once the Ida Lewis Leadership Team is fully in tact, a teacher, parent, and Board of Trustees representative will be invited to serve on future hiring committees in the spirit of shared leadership. We will very intentionally involve our teachers in administrative decisions that impact them directly. The Executive Director and designated members of the Board of Trustees will develop the specific terms and conditions of employment. However, at a minimum, all of our classroom teachers will hold a Rhode Island elementary and/or middle school certification, pass a BCI check, and be willing to become CPR certified. We will preferably hire teachers who are also certified in special education and/or hold an English Second Language Endorsement. All of our middle school teachers (grades 6-8) will have an

endorsement in the content area they teach and they will have successfully passed the applicable Praxis test pertaining to their content area and/or successfully completed 30 college credits in the content area.

The executive director will evaluate each member of the leadership team using an instrument that is developed by the team. Members of the leadership team will also have the opportunity to formulate their own measurable goals that are aligned to the mission statement of Ida Lewis Leadership Academy. Progress towards attainment of these individualized goals will be included in the narrative portion of the evaluation as well as a personal reflection from each member of the leadership team. Each evaluation will contain a narrative segment that includes strengths and opportunities for improvement. Similarly, the Board of Trustees will evaluate the Executive Director. The Executive Director will formulate three goals in relation to educational leadership and three goals pertaining to the efficient and effective management of the organization. The Board of Trustees will monitor the extent to which these goals are attained and they will conduct face-to-face interviews with the Executive Director's direct reports. These individuals will provide constructive feedback for improvement in terms of the Executive Director's performance. The Executive Director will also have the opportunity to craft a reflection that articulates strengths and opportunities for improvement. We firmly believe that the process of evaluation is more meaningful and purposeful when the person being evaluated has ownership as well as the opportunity to engage in honest reflection.

Section V (f). Teachers

The Ida Lewis Leadership Team will be very thorough and intentional with the recruitment and retention of a diverse and talented team of teachers who are certified and highly qualified. Teachers are indeed the backbone of any school and they must be selected carefully to ensure that their qualities and characteristics are appropriately aligned to the needs of the students and the mission and vision of the organization. A philosophical alignment is equally as important. As such, all candidates will be required to articulate how their teaching philosophy aligns to our mission statement. Candidates will also be required to craft an essay on how they apply the *7 Habits of Highly Effective People* (Covey 1989) to their life and to their teaching practice. Since the *7 Habits* are the foundation of our adult and student culture, it will be critically important for candidates to demonstrate how they have either advertently or inadvertently embraced these principles. Teaching candidates will also be required to clearly describe how they would embed the *7 Habits* into their classroom rituals, routines, and instruction. We want our teachers to be able to connect theory to practice, so we will require candidates to deliver a demo lesson pertaining to the *7 Habits* as part of our robust and comprehensive interview process.

In addition to demonstrating a deep understanding of the *7 Habits*, we are seeking teachers who have knowledge and expertise in experiential learning, 21st Century skills, and the integration of technology. We also are looking for teachers who are passionate about educating the *whole child* and who recognize that children's socio-emotional growth and development are equally as important as their academic and physical growth. Additionally, our teachers will demonstrate the core values of compassion, courage, respect, and determination in the classroom as well as in the community at large. Our teachers will be team players that work tirelessly to ensure all children have the necessary supports and enabling circumstances

that lead to success. Our teachers will always put the needs of children first and they will lead by example. Finally, our teachers will motivate, empower and inspire students to be leaders in the classroom and beyond the classroom.

Our comprehensive and robust selection process will be multifaceted. As previously mentioned, members of the Ida Lewis Leadership Team will serve on the recruitment and hiring team. We will also invite a parent and Board of Trustees representative to serve on the hiring team. In addition to posting teaching positions on School Spring, representatives from our Leadership Team will attend local job fairs as well as job fairs in other regions of the country. In order to recruit a diverse staff that is reflective of the student population we serve, the Executive Director will connect with the education departments at the Historic Black Colleges and Universities (HBCU's) to recruit highly qualified teachers of color. In addition to promoting Ida Lewis Leadership Academy as a viable and fulfilling place to work, we will promote the natural and historical resources of Newport County and entice potential candidates to embrace Newport County as an ideal place to reside. Following our extensive interview process, candidates will be required to construct two written essays articulating how their educational philosophy aligns with Ida Lewis Leadership Academy's mission statement and how they would apply the *7 Habits of Highly Effective People* to their teaching practice. We will also require candidates to teach a lesson pertaining to the *7 Habits*. (Candidates will be informed about these requirements prior to their interview, so they have adequate time to prepare). A final aspect of the interview process will require teachers to participate in a fishbowl activity and/or hypothetical situation in which they respond to a dissatisfied parent and address an unacceptable behavior of a student. All segments of this rigorous selection process will be scored quantitatively using rubrics that were designed by members of the hiring team. The top three candidates will be recommended to the Executive Director who will make the final decision. Teachers selected for positions at Ida Lewis Leadership Academy will be certified, highly qualified, and have successfully passed a BCI check prior to executing an employment agreement.

Besides delivering instruction, supporting learning, and performing other classroom specific roles and responsibilities, teachers will be also be required to become "experts" in at least one educational initiative at Ida Lewis Leadership Academy. For example, there will be a teacher expert for each of the following areas: *7 Habits*, Experiential Learning, 21st Century Student Outcomes, Cultural Competency, and Environmental Sustainability. Teachers will each have the opportunity to lead a Professional Learning Community (PLC) on one of these initiatives, which will in turn, build capacity from within and expand our collective understanding of and commitment to our school's initiatives. Each teacher will also be required to serve on one of the following committees: Continuous School Improvement Team (CSI), Response to Intervention Team (RTI), Parent Engagement Team (PET) or the Curriculum Alignment Team (CAT). Teacher membership on these teams will rotate so all teachers have the experience of serving on different teams.

All professional development initiatives at Ida Lewis Leadership Academy will be aligned to our mission statement, job-embedded, and connected to students' learning outcomes. For example, as previously mentioned, there will be teacher "experts" in each of the different initiatives referenced in our mission statement. These teacher experts will be responsible for deepening our collective understanding of each initiative and keeping these initiatives alive in

our classrooms through job-embedded professional development. Job-embedded professional development provides teachers with meaningful and purposeful opportunities to grow professionally through experiences that are grounded in day-to-day teaching practices, classroom-based, and integrated within the regular workday. According to Darling-Hammond & McLaughlin (1995) and Hirsh (2009), job embedded professional development improves teachers' content-specific instructional strategies and enhances student achievement. Furthermore, job-embedded professional development is an ongoing process that draws a direct connection between the improvement of teaching and learning. As a result of providing a multitude of opportunities for job-embedded professional development, members of the Ida Lewis Leadership Academy teaching faculty will participate in Professional Learning Communities (PLCs), conduct ongoing peer observations followed by deep conversations about the art and craft of teaching, provide coaching and mentoring to one another and engage in ongoing data analysis through the examination of student work and formative assessments. The job-embedded professional development model will also afford teachers with opportunities to conduct action research, participate in critical friends groups, and engage in case discussions.

To support the provision of job-embedded professional development, there will be several structures built into our master schedule, which will in turn provide teachers with opportunities for reflection and collaboration. For example, teachers in grades K through 2 will have common planning time on a weekly basis to examine student work, engage in data analysis, and vertically align the curriculum. There will also be time embedded within the master schedule for weekly Response to Intervention meetings in which teachers identify the root causes of why students might be struggling academically or behaviorally. Research-based interventions will be identified and subsequently applied in the classroom for duration of time. The team will reconvene to determine whether the interventions were effective and decide whether further evaluations or assessments are necessary.

Another structure that will support the professional growth and development of our teaching faculty and improve teaching and learning will be the looping model that will be applied to grades K through 2. The looping model, also known as student-teacher progression and multiyear instruction, was endorsed by the U.S. Department of education dating back to 1913. This concept was most likely originated in the early 1900s by Rudolf Steiner who based his Waldorf schools on "whole-child" education. Teachers at Steiner's schools actually kept the same students in grades 1-8 (Ullman 2005). We intentionally decided to apply the looping model to our early childhood leadership academy as part of our commitment to educating the "whole-child." By allowing students to remain with the same teacher in kindergarten through grade two, our educators will have the opportunity to build rich relationships with our scholars and their families which will in turn cultivate trusting, caring, and nurturing classroom environments. This structure will also allow our early childhood teachers the opportunity to develop a deep and intimate understanding of our students' learning styles, interests, strengths, and opportunities for growth. The implementation of the looping model at Ida Lewis Leadership Academy will also support and enhance our students' socio-emotional needs and increase their confidence in themselves as learners and leaders. The looping structure will increase accountability of teaching and learning and it will provide a supportive classroom

environment, a richer curriculum, and an opportunity for teachers to postpone high-stakes decisions that would dramatically impact a child's educational career (Rasmussen 1998).

Another structure that will be put in place to support, enhance and deepen teaching and learning is the departmentalization of grades 3 and 4. Our two third and fourth grade teachers will share their caseload and departmentalize by subject matter. For example, the third grade teacher will provide literacy and multicultural studies instruction to students in grades 3 and 4, and our fourth grade teacher will provide mathematics and inquiry-based science instruction to students in grades 3 and 4. Students in grades 3 and 4 will essentially each have two teachers who are "experts" in the content areas they teach. This will allow teachers the opportunity to maximize instructional time by concentrating on fewer disciplines. This structure will provide students with a more smooth and seamless transition to our middle school leadership academy; it will provide students with the much-needed opportunity for movement during the instructional day; it will provide students with the access to instructors who are efficacious with the content they are teaching; it will provide students with exposure to different teaching styles; it will ensure that no content area is neglected; it will increase accountability of teaching and learning; it will provide teachers with more flexibility to group students according to their individualized needs; it will provide teachers with rich opportunities to integrate disciplines and make real-life connections to the content; and it will support experiential learning.

There are several strategies that will be employed to further support and enhance the professional growth and development of our teaching faculty. The Executive Director will be fully committed to the implementation of the Rhode Island Model Teacher Evaluation and Support System. Ongoing training will be provided to our teaching faculty in relation to this evaluation instrument. At the beginning of each academic year, teachers will be required to formulate professional growth goals that are aligned to our mission statement and our School Improvement Plan and most importantly, connected to student learning. Additionally, our part-time Educational Consultant will be responsible for collecting qualitative and quantitative data in relation to staff sustainability and retention. A staff sustainability survey will be administered on a yearly basis and the data will be used to make informed decisions about the professional and personal needs of our staff. We will also examine classroom observation and evaluation data to identify the professional needs of our teaching faculty. Once fully established, we will pursue a formal partnership with a university with the goal of becoming a Professional Development School. Under this model, aspiring teachers would be assigned to our school for their practicums and field placements in exchange for pro bono professional development that would be provided by professors from the university. This mutually beneficial, synergistic relationship would support our teachers' professional growth and ensure that they remain current with the latest and greatest research-based instructional best practices.

Classroom teachers will be required to work 8 hours per day from 8:00-4:00. They will have a 30-minute lunch period and a 60-minute planning period each day. Teachers will be strongly encouraged to develop a rotating schedule in which they take turns eating lunch with students. This ritual will help build positive relationships with students and further strengthen our community. Teachers will also work collaboratively with the Specialist Teachers and Teaching Assistants towards the development of a rotating schedule to address the other operational duties in the building such as recess, bus, drop-off and dismissal duties. Specialist

teachers who teach Physical Education/Health, Creative Arts, Spanish, STEM, and Information, Technology & Media will work from 12:00-6:00. By having these teachers work different hours, we will have the flexibility to utilize them to provide coverage during classroom teachers' planning periods and provide a comprehensive after-school enrichment program. Initially, our specialist teachers will work part-time until our school has reached full capacity. Our Teaching Assistants will also work part-time (24 hours per week).

Teachers will be encouraged to actively participate in the governance and operations of the school by playing an integral role in making informed decisions that directly impact teaching and learning. For example, they will engage in ongoing evaluation of the curriculum; they will propose new policies and revise existing policies; they will assess the orderly operations of the building and they will be empowered to provide administration with suggestions to improve the overall efficiency of our operations. When we encounter obstacles along our journey, staff will be invited to work through issues together and reach a consensus as to how we can move forward together in a productive way that will in turn benefit the organization and most importantly, the children and families we serve.

Section V(g). Management Organizations and other Essential Partners – Not Applicable

Section V(h). Family-School Partnership

Ida Lewis Leadership Academy will develop a robust and multi-faceted Family-School Partnership policy and program to support the ongoing success of our scholars. We believe that family involvement is an integral component of a school's overall success, and we intend to engage and empower our families to play an active role in enhancing teaching and learning and in improving the governance and operations of our school. On an annual basis, we will administer a family satisfaction survey and a family talent and interest survey. Data gleaned from these instruments will be used to make informed decisions in relation to how we can engage our families in meaningful and purposeful ways. We intend to match our family members' unique skills and talents with the needs of our organization. For example, if we have a family member who is a chef, we would utilize this person to cater our events. We strongly believe in giving back to our families and our community.

We want our families to feel embraced and welcomed from the moment they enter our school. In order to accomplish this, we will post a suggestion box in the front office where families can provide ongoing feedback to improve our school. We will also ensure that our front office staff receives in customer service training, so our families feel valued and appreciated when interacting with our members of our staff. In addition to efficiently and effectively meeting the needs of our families whenever they visit our school, we will ensure that families have opportunities to volunteer in our classrooms. Our Family Engagement Officer will be responsible for training our volunteers and providing our families with ongoing access to resources and materials to support our children's academic and socio-emotional growth. In addition to creating a virtual parent resource center on our website, we will create a family resource center in our school where parents can visit and connect with other members of our community. This resource center will be filled with books, magazines, and take-home activities to further enhance student learning. There will also be an abundance of articles, books and research pertaining to the *Seven Habits* (Covey 1989), which are the foundation of

our adult and student culture. We will offer parent workshops on the *Seven Habits* to support them in applying these principles to their households and everyday lives.

In addition to equipping families with the necessary resources to help support our scholars, we are committed to empowering our families to enhance their own lives through the acquisition of new knowledge and skills. Thus, our multifaceted family engagement initiative will involve Ida Lewis Leadership Academy partnering with other Newport County Public Schools, local colleges and universities, non-profit organizations, local businesses, and social service agencies. The overarching objective our Family-School Partnership Program will be to enhance the lives of our families so they in turn have the knowledge, skills, and expertise to enrich their child's educational experience. Through the implementation of a quasi Parent Academy model of family engagement, parents from Ida Lewis Leadership Academy and partnering Newport County Public Schools will be invited to enroll in monthly two-hour workshops focusing on the following topics: Family Literacy for English Language Learners, Family-Friendly Common Core Standards, Advocacy for Students with Special Needs, Healthy Cooking to Promote a Lifestyle of Wellness, Relaxation & Meditation, Functional Fitness, Stress Management, Financial Literacy, Digital Literacy, Homework Help, and Support for Single Parents. Transportation, translation, childcare and a light dinner will be provided to families who attend these workshops. In addition to the family engagement workshops, we will host a Family Wellness Night, a Family Literacy Night, and a Family Math Night at our school. These events will be opened to Ida Lewis Leadership Academy's families as well as the families from the Newport County public schools that partner with us. The purpose of these events will be to engage our families and community members in a mutually beneficial partnership that will have a positive impact on student learning outcomes. For example, at Family Math Night, we will have a variety of stations that families can visit where they participate in hands-on activities that will support students' conceptual and procedural understanding of mathematics. These learning stations will be facilitated by members of our teaching staff and aspiring teachers from local colleges and universities. During Family Literacy Night, families will have the opportunity to visit a variety of literacy stations pertaining to comprehension, vocabulary development and fluency. There will also be learning stations that integrate technology and families will be provided with access to online resources that will further support their children with their reading and close any achievement gaps that might exist. Parents will leave each of these family engagement events with a wide variety of resources, games and activities that will further support and enhance student learning.

In addition to volunteering in our classroom, serving on the Parent Teacher Student Organization, and serving on the Continuous School Improvement Team, we will encourage our parents to be involved with other facets pertaining to the governance and operations of our school. For example, we will recruit parents to serve on the Board of Trustees as well as the various Board committees. We strongly believe that "it takes a village" to build a school that is responsive to the needs of all its stakeholders and we are fully committed to involving all stakeholders in the process of continuous school improvement.

Section VI. Schedule & Calendar

The founders of Ida Lewis Leadership Academy created separate master schedules for each of the following academies within our organization: Grades K-2, Grades 3-4, and Grades 5-8. The following charts depict each of our master schedules:

K-2 Master Schedule

8:00-8:20	Rituals, Routines, and Morning Meeting
8:20-9:50	<i>Singapore Math in Focus</i>
9:50-10:00	Morning Break & Snack
10:00-12:00	Balanced Literacy Integrated with Multicultural Studies
12:00-12:30	Recess
12:30-1:00	Lunch
1:15-2:15	Specialist Class (STEM, PE/Health, Creative Arts, Library & Media, & Spanish)
2:15-3:30	Inquiry-based Science
3:30-4:00	Intervention Block & Learning Stations
4:00-6:00	After School Enrichment & Extracurricular Activities

Grades 3-4 Master Schedule

8:00-8:20	Rituals, Routines, and Morning Meeting	
	Grade 3	Grade 4
8:20-11:00	<i>Singapore Math in Focus</i> Morning Break & Snack Inquiry-based Science	Balanced Literacy Morning Break & Snack Multicultural Studies
11:00-11:30	Recess	
11:30-12:00	Lunch	
12:00-2:30	Balanced Literacy Multicultural Studies	<i>Singapore Math in Focus</i> Inquiry-based Science
2:30-3:30	Specialist Class (STEM, PE/Health, Creative Arts, Information & Media, & Technology, Spanish)	
3:30-4:00	Intervention Block	
4:00-6:00	After School Enrichment & Extracurricular Activities	

Grades 5-8 Master Schedule

(The 4 Core Subjects are as follows: English Language Arts, Singapore Math In Focus, Multicultural Studies, and Inquiry-based Science)

8:00-9:15	Core Subject #1
9:15-10:30	Core Subject #2
10:30-11:00	Recess
11:00-11:30	Lunch
11:30-12:45	Core Subject #3
12:45-2:00	Core Subject #4
2:00-3:00	Elective (Spanish, AVID, Creative Arts, PE/Health, & STEM)
3:00-3:30	Advisory
3:30-4:00	Intervention
4:00-6:00	After School Enrichment & Extracurricular Activities

The master schedules above reflect the length of the school day as well as the allocation of time for each subject area. For example, the K-2 schedule reveals the following allocation of instructional minutes per day:

Mathematics	90 minutes
Balanced Literacy & Multicultural Studies	120 minutes
Science	75 minutes
Specialist Subjects	60 minutes
Intervention	30 minutes

Total Instructional Minutes Per Day = 375

Total Instructional Minutes Per Year = 71, 250

The Grades 3-4 Master Schedule reflects the following allocation of instructional minutes:

Mathematics & Inquiry-based Science	150 minutes
Balanced Literacy & Multicultural Studies	150 minutes
Specialist Subjects	60 minutes
Intervention	30 minutes

Total Instructional Minutes Per Day = 390

Total Instructional Minutes Per Year = 74,100

The Grades 6-8 Master Schedule reflects the following allocation of instructional minutes:

Mathematics	75 minutes
English Language Arts	75 minutes
Inquiry-based Science	75 minutes
Multicultural Studies	75 minutes
Specialist Subject	60 minutes
Advisory	30 minutes
Intervention	30 minutes

Total Instructional Minutes per day = 420

Total Instructional Minutes per year = 79,000

In addition to providing a significantly greater amount of instructional time geared toward the core subjects, the founders of Ida Lewis Leadership Academy were very intentional in including an intervention block into our daily schedule. The intervention block would provide teachers with additional time to work with small groups of students who are struggling in certain areas while students who are more advanced would have time for enrichment to expand and deepen their learning. We would utilize a blended learning model as well as learning stations to engage students during the intervention block. For example, on any given day during the intervention block, students would be engaged in one of the following activities: working in small cooperative groups on a project, conferencing one-on-one with their teacher, accessing online learning vehicles such as Kahn Academy or IXL to reinforce existing skills, practice new skills, or deepen their knowledge in content areas.

Below is a draft daily schedule that reflects the day in the life of one of our 6th grade scholars. (ELA stands for English Language Arts. MCS stands for Multicultural Studies. STEM

stands for Science Technology, Engineering Mathematics. AVID stands for Advancement Via Individual Determination, CA stands for Creative Arts and ASE stands for After School Enrichment).

6th Grade Student Daily & Weekly Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00-9:15	Math	Science	ELA	MCS	Math
9:15-10:30	Science	ELA	MCS	Math	Science
10:30-11:00	Recess	Recess	Recess	Recess	Recess
11:00-11:30	Lunch	Lunch	Lunch	Lunch	Lunch
11:30-12:45	ELA	MCS	Math	Science	ELA
12:45-2:00	MCS	Math	Science	ELA	MCS
2:00-3:00	STEM	Spanish	AVID	CA	PE/Health
3:00-3:30	Advisory				
3:30-4:00	Intervention				
4:00-6:00	After School Enrichment				

The founders of Ida Lewis Leadership Academy intentionally rotated the core subjects of the grades 5-8 daily and weekly schedule. We believe that this rotating schedule will allow for students to experience different core subjects at different times in the day, thus increasing students' chances for succeeding in each core subject. Based on our past experiences in various educational leadership capacities, we have noticed that middle school students demonstrate varying levels of energy and attention at different times of the day. In addition to affording our students with the opportunity to have core classes at different time in the instructional day, this rotating schedule will help develop students' organizational and time management skills.

We were also very purposeful about including an advisory block and intervention block at the end of each instructional day. This will enable our teaching staff to focus on students' study skills, organizational skills, and most importantly their socio-emotional needs. The *7 Habits* will be an integral part of the advisory block and a time where teachers and students can explore ways to infuse these principles into their day-to-day lives. The *Leader in Me* curriculum will be used to teach the *7 Habits* in ways that are meaningful, purposeful, and connected to students' lives at school and beyond school. As mentioned previously, the intervention block will be used to support struggling learners challenge advanced learners through research-based best practices and blended learning opportunities. Students will also have time for cooperative group work with their peers and one-on-one goal-setting conferences with their teachers.

The After School Enrichment Block will be a time where students begin to work on the completion of their homework for designated amount of time and they will also have a choice of activities that are matched and tailored to their individual needs and interests. We will interview students to find out what types of activities they prefer and plan accordingly. Examples of After School Enrichment will be as follows: Health & Wellness activities such as intramural sports, swimming, sailing, Zumba, Yoga, Kickboxing & Martial Arts; Creative Arts activities such as hip-hop, chorus, drama, and instrumental music; STEM Club, Literary Magazine, debate club, cooking club, world language club and student leadership council. We

will utilize our own specialist teachers to provide these services and we will cultivate partnerships with community businesses and stakeholders to further expand our after school offerings.

Below is a draft schedule that reflects a typical teachers' allocation of minutes during a given week based on the amount of time that is devoted to instruction, planning, job-embedded professional development and activities pertaining to the fulfillment attainment of the mission:

	Monday	Tuesday	Wednesday	Thursday	Friday
Instructional	315-360	315-360	315-360	315-360	315-360
Planning	60	60	60	60	60
Job-embedded Professional Development	30	30	30	30	30
Mission/Culture	30	30	30	30	30

Basically, out of 2,400 minutes in a typical workweek, approximately 2,175 minutes will be allocated toward the activities referenced in the chart above. Time is clearly the most precious commodity in an educational setting and every minute matters. The faculty and staff at Ida Lewis Leadership Academy will work diligently to ensure that time is maximized and focused on improving teaching and learning.

Our proposed 2015-2016 Academic School Calendar is included in the Appendices of this document. The calendar reflects a 190-day school year.

Section VII. Student Enrollment, Outreach, and Demand

The table below depicts the proposed enrollment plan for Ida Lewis Leadership Academy:

School Year	Grade Levels	Enrollment	# of Sites
2015/16	K-4	100	1
2016/17	K-5	120	1
2017/18	K-6	140	1
2018/19	K-7	160	1
2019/20	K-8	180	1

The founders of Ida Lewis Leadership Academy contemplated the benefits and challenges of the above-referenced enrollment plan. We realize that there is some resistance

to school choice in Newport County and this opposition is most likely accompanied by a misunderstanding of a charter school's purpose, which is to level the playing field for traditionally underserved students and serve as laboratories of innovation. In addition, we are aware of the declining student enrollment in the Newport Public Schools. Thus, we were purposeful in building a small school. Small schools offer a sense of intimacy that simply cannot be achieved in larger schools. All of the teachers in small schools have the opportunity to be vested and invested in every student's success. Additionally, small schools are more manageable and it is easier to cultivate a sense of community within a small school. Our final reason for creating a small school is because we truly believe that the most strategic way to introduce school choice to Newport County is with a small school that would not have as much of a financial impact on other public schools throughout Newport County.

There are several reasons why we chose to enroll 100 students in five grade levels during our first year of operation. First and foremost, our enrollment plan provides students from a wider range of grade levels and backgrounds the opportunity to take full advantage of our innovative academic and enrichment programs. We want to offer the most opportunities to the greatest amount of students from the moment our doors open. Additionally, we are striving to meet the needs of students who have been traditionally underserved by schools throughout Newport County. We also want to collect baseline data from our incoming students in grades 3 and 4 who will take the state-mandated standardized tests during our first year of operation. This is of course a risk that we believe is outweighed by the amazing opportunities that will be provided to these children along with the valuable pieces of student achievement data that we will use to begin formulating our School Improvement Plan. By enrolling students in 5 different grades, we will also have the opportunity to recruit and hire a greater amount of teachers who will help us build our school's culture. We firmly believe the multiple perspectives of these teachers will further enhance the overall success of our organization as we grow together as a strong and cohesive team.

We fully recognize the challenges that we will encounter given our proposed enrollment plan. For example, in addition to hiring more teachers the first year, we will need to develop curriculum for five grade levels, provide professional development to our teachers, and purchase equipment, educational supplies and materials to meet our students' needs. Given the possibility of receiving the startup grant funding coupled with the per pupil allowance, we will have more capacity to build our programs up front and then gradually add one grade level for each subsequent year until we reach full capacity. With a starting enrollment of 100 students, we will also have the opportunity to build positive relationships with many families during our first year of operation. We will actively engage these families in the operations and governance of our school and begin to build capacity from within our organization.

Given the experience that our founders have working in charter schools, we have an intimate understanding of the importance of student attrition and enrollment projections. We understand how average daily enrollment is calculated and we realize that there is a sense of urgency to fill seats in the event that students decide to vacate our school. Thus, the Executive Director and the Family Engagement Officer will work closely and diligently on ensuring that our seats are filled. We will over enroll by 3-5 students to ensure that our average daily enrollment remains steady and we will verify the accuracy of our waiting list

regularly. In the event there is an opening in any particular grade, Our Family Engagement Officer will reach out the next family on the waiting list immediately.

Ida Lewis Leadership Academy will remain in full compliance with the applicable state and federal statutes and regulations that govern how students enroll into charter public schools. We will of course abide by the 2010 “Charter Public School Act of Rhode Island”, the 2011 “Regulations Governing Rhode Island Public Charter Schools” and the 2014 “Lottery and Enrollment Guidance issued by RIDE. We will also take full advantage of the most recent guidance from the U.S. Department of Education in relation to the preference that can be given to educationally disadvantaged students in charter school lotteries. We will use a weighted lottery to enroll more educationally disadvantaged students so the students who are traditionally underserved will have a greater chance of gaining entrance to our school and taking advantage of the innovative academic and enrichment programs that we offer. Thus, students with special needs, students who are classified as low-income or homeless, and students who are English language learners will have a greater chance of gaining entrance into Ida Lewis Leadership Academy.

The founders of Ida Lewis Leadership Academy will implement a robust and multi-faceted outreach and recruitment process to ensure that our classrooms reflect the diversity of their neighborhoods throughout Newport County. In the event that our charter proposal is approved, we will engage in a public outreach campaign in each of our sending communities including: Newport, Middletown, Jamestown, Little Compton, Tiverton, and Portsmouth. Our marketing campaign will involve door-to-door visits to potential stakeholders’ homes, outreach at high-traffic public venues such as local business establishments, churches, YMCA, Boys & Girls Club, and Martin Luther King Center. We will schedule public forums with the Alliance for a Livable Newport, which is a non-profit focused on improving the quality of life in the community. We will also advertise in the *Newport Daily News* and other local newspapers such as *Newport This Week*, the *Jamestown Press*, and the *Sakonnet Times*.

We will use the standard, paper-based student enrollment application that was developed by the Office of Charter Schools. Additionally, we will include one or more RIDE-approved questions to the standard enrollment application that will yield information about an applicant’s status as at-risk or economically disadvantaged. This will in turn enable us to weight our lottery for this particular population. Applicants will have the opportunity to apply through the traditional paper-based vehicle as well as an online application that will be posted on our website. After applying online or through the paper-based vehicle, a dated confirmation will be provided to the prospective student. Our manual public lottery will take place in accordance with RIDE’s regulations on March 1st of the year prior to enrollment. Students’ names will be recorded on cards and placed into a bingo drum. Students who are limited English proficient, students who have special needs, and students who are economically disadvantaged will have a greater probability of being selected because they will each have three chances in the lottery. Students with siblings will be also be given preference so families are not faced with the challenged of having children at different schools. During the public lottery, once names are drawn, the cards will be placed on a public board under the applicable grade level in the interest of transparency. Once all available seats have been filled, cards remaining in the drum will be drawn, one-by-one and placed on a waiting list in the order in which they were chosen. The waiting list will be maintained through the last day of the academic year and a new waiting

list will be formulated each subsequent year thereafter. Families will be notified within five business days of whether their child was selected or placed on the waiting list. They will in turn have 15 business days to accept the placement before the seat is offered to the next applicant on the waiting list. Multiple methods of notification will be employed by our Family Engagement Officer including a phone call, written notification via certified mail and if necessary, a home visit to ensure that all available seats are filled in a timely manner.

Section VIII. Facilities

The founders of Ida Lewis Leadership Academy have given serious consideration to the selection of a facility that will meet our programmatic needs in addition to supporting the financial sustainability of our organization. We will refer to the *Rhode Island Standards for School Buildings and Facilities*, Section 15-2.4 in determining whether our proposed facility meets regulatory compliance. Given our proposed enrollment of 180 students, we are seeking a building that has at least 15 classrooms with an appropriate amount of square footage to accommodate 20 students per class and an abundance of outdoor space. We would also need sufficient classroom space to accommodate a library & technology lab, a STEM lab, a creative arts studio, as well as an indoor and/or outdoor space for a fitness studio and an appropriate space for our entire community to gather together for weekly morning meetings and monthly town meetings. Given our commitment to experiential learning and educating the “whole child” we are pursuing a facility that would be conducive to learning taking place beyond the four walls of the school. Ideally, we are envisioning a campus with separate buildings that would house our K-2 academy, our grades 3-4 academy and our grades 5-8 academy. There would be sufficient land for outdoor recreation, the creation of a community garden, and an outdoor learning environment. Our facility would preferably be located within walking distance from the ocean, which would further enrich our curriculum. We are seeking a building with an abundance of natural light and land that is conducive to the construction of a scenic walking trail and a manmade pond. Ideally, this facility would be located in the City of Newport, on the opposite end of the city as the Pell School. This facility would be a neighborhood school and it would be in close proximity to the wide array of natural and historical resources that Newport has to offer.

Compliance and safety issues are at the forefront of our minds when selecting the appropriate facility. We understand the financial burden of inhabiting a facility that is not ADA accessible and is not in compliance with fire codes. Thus, we are seeking a building that meets all of these criteria. We are also looking for a building with up-to-date mechanical systems that run efficiently. Indoor and outdoor air quality is also of the utmost importance in selecting the appropriate facility. Thus, we would be diligent about testing the indoor and outdoor air quality of our proposed facility to ensure compliance with the National Ambient Air Quality Standards.

Once we select a building that meets all of our expectations, we would explore grant funding opportunities to transform our facility into a net zero building, which would demonstrate our commitment to sustainability. We would also explore the possibility of solar heat and lighting. Our ultimate goal is to create a high-quality learning environment that conserves natural resources, consumes less energy, and is relatively easy to maintain.

We are in the process of working with the appropriate parties from the City of Newport to find a facility. There are several excessed schools in Newport, but there is only one facility that meets our needs. However, the City of Newport is in the process of consulting with a broker to determine how to use these vacant properties. Thus, there is a risk that our preferred property will be sold. We recognize this possibility as our greatest challenge in finding a suitable facility, but we are optimistic that with the appropriate amount of public outreach and advocacy, we will be able to rent this property from the City of Newport. In the event that we are able to rent this property, the terms and conditions and for the use of the property and a draft lease will be provided to the RIDE Office of Charter Schools. Our long-term goal will be to launch a capital campaign that will lead to the eventual purchase of this property.

In the event that the City of Newport is not able to rent one of the existing vacant properties to Ida Lewis Leadership Academy, we have begun to explore other possibilities. For example, there is a vacant church school that has the space we would need to run smoothly and efficiently. There is also ample parking and this facility is located within walking distance to Newport's natural and historical resources. We are in the process of working with this church to develop a tentative arrangement should the need arise.

Once we have secured a facility that appropriately and adequately meets our needs, we will ensure that there are systems and structures in place to address facilities-related issues and oversee operations and maintenance of our charter school. Our Board of Trustees will convene a Facility Committee that will meet four times annually to identify the needs of our facility and develop action plans to address these needs. Our Finance Officer will be in charge of dispatching the appropriate contractors to address day-to-day maintenance issues that arise. We will conduct a bidding process to obtain licensed contractors that are equipped to address our maintenance needs. The Facilities Committee will evaluate the top three bids and make the final selection of outside contractors. An electronic work order system will be put in place immediately to ensure that the faculty of Ida Lewis Leadership Academy has a vehicle to report needed repairs. All repairs will be addressed in the order in which they were received. Repairs that interfere with a staff member's ability to perform the roles and responsibilities of their job will be addressed immediately.

Section IX. Operations

Ida Lewis will ensure full compliance with the applicable state legislation and school health rules and regulations and we will formulate a comprehensive Health, Safety and Nutrition Policy Manual. In developing our school health programs and school safety plans we will refer the following sources:

- Guide to Identifying and Reporting Child Abuse in Schools
- Guidance for Implementation of CPR Training Law (2013)
- Guide to Preventing Bullying, Teen Dating Violence and Sexual Violence
- Policy Statement Prohibiting Discrimination Based on Sexual Orientation
- RI Model Tobacco-Free Schools Policy Language
- RI Nutrition Guidelines for School Vending & A La Carte Foods
- RI Peanut Allergy Law Guidance Documents

- RI Policy Guidelines Relating to HIV/Hepatitis
- RI Regulations Governing the Education of Children with Disabilities
- RI School District Nutrition & Physical Activity Model Policy Language
- RI State Fire Marshall Policy Statement RE: Hand Sanitizers

As reflected in our previously referenced staffing chart, we will be hiring a part-time school nurse teacher. Our school nurse teacher and our physical education teacher will both be certified health teachers. Additionally, each member of our faculty will be certified in CPR. Our staff will also receive yearly Glucagon, AED, and Epi-Pen training.

In the event that our charter application is approved, one of our first orders of business will be to establish a Crisis Response Team, which will be overseen by the Executive Director and charged with developing a School Emergency Operations Plan. This team will reference FEMA's Guide for *Developing High-Quality School Emergency Operations Plans* to ensure that our School Emergency Operations Plan is comprehensive and includes the necessary components of prevention, protection, mitigation, response, and recovery as required by the *Presidential Policy Directive (PPD)8*. Our plan will also adhere to the "Six Universal Emergency Procedures" and "Bomb Threats" specified in RIGL 16-21-4 and 16-21-5.

As mentioned previously, Ida Lewis Leadership Academy intends to contract with a local proprietor to provide high-quality, healthy food options for our students. Kelle's Little Café in Newport will prepare lunch and breakfast for our students on a daily basis. The proposed business plan from Kelle's Little Café and a sample menu are included in the Appendix. Kelly will introduce different ethnic foods on a daily basis to expand students' awareness of diverse cultures. An integral part of the dining experience will involve students learning about nutrition. Our community garden will provide a source of fresh vegetables and herbs. Students who are vegetarians or have food restrictions due to religion or allergies will be provided with healthy alternatives. Our cafeteria will be transformed into the Lighthouse Café, which will be a unique and delightful dining experience for our students. There will be nautical murals on the walls of local points of interest. Students will dine at round tables that are conducive to conversation and interaction. Soothing music will be playing in the background to create a peaceful and relaxing atmosphere. There will be an abundance of natural sunlight flowing through the large windows and a variety of tropical plants to create a healthy and aesthetic environment for our students. Families and community stakeholders will be welcomed to join our students for lunch on a daily basis.

Ida Lewis Leadership Academy intends to use Ocean State Transit or First Student to meet its transportation needs. Given our student enrollment, we are estimating the need for two buses, which would incur an approximate annual cost of \$105,282.80. Before our doors open, we will adopt clear drop-off and dismissal procedures to ensure the safety and wellbeing of our students. Students will disembark from buses in a separate area from where parents drop off children. On a daily basis, staff will be situated curbside to greet students each morning and dismiss students each afternoon. Positive identification will be required during pickup to ensure that all children are dismissed to the appropriate parties. Additionally, all families will receive an Ida Lewis Leadership Academy sticker that will be placed on the windshield of their vehicle as an additional safety and security measure.

Given the small size of our organization, we recognize the importance of operating in an efficient and lean manner. Thus, members of our senior leadership team will perform a variety of roles to support the operations of our charter school. The Finance Officer will be responsible for human resources and purchasing functions. An outside firm from within the community will be utilized for payroll. We will initiate a bidding process and make a financially responsible decision as to which local payroll service best meets our needs. The Executive Director's Assistant will share the data management responsibilities with the Family Engagement Officer. Information Technology services will be provided by an outside contractor or alternatively, we will offer a stipend to a teacher who has the appropriate skills, knowledge and experience to perform these roles. An electronic work order system will be put in place to address day-to-day IT issues that may arise. Our entire IT infrastructure will be wireless, which will eliminate networking issues. We will use G-mail as our free e-mail system and Google Chrome Books will be purchased for all students and teachers.

Section X. Startup Timeline

The Executive Director and her designees will be responsible for completing the tasks outlined in the School Development Timetable. A reasonable timeframe for the completion of each project is as follows:

April 2014-August 2014

- Submission of Preliminary Charter Application to RIDE
- Participation in RIDE Internal, External and Open public meetings
- Receipt of Preliminary Approval
- Confirmation of composition of Board of Trustees and deliver Board Training
- Enlist the Board of Trustees in the review and approval of Bi-Laws
- Recommendation for Preliminary Approval issued by Commissioner
- Apply for Charter School Program (CSP) funding from State

September 2014-December 2014

- Recruitment of Legal Counsel, Accountant, Accountant and additional Board Members
- Cultivation of community and business partnerships and execution of Memorandums of Understanding
- Selection of a local bank to support building operations (BankNewport)
- Receipt of funds for organizational infrastructure building
- Execution of lease agreement
- Completion of necessary building repairs and upgrades
- Submission of application for grant funding to further enhance academic programs
- Coordination of annual fundraising events

January 2015-June 2015

- RIDE Readiness Criteria Met
- Recruit, interview, and hire staff in accordance with year one of hiring plan
- Curriculum development completed by staff
- Creation of marketing plan

- Student recruitment, submission of applications, and public lottery
- Completion of building renovations
- Finalization of food service, transportation and facility maintenance plans

July 2015-August 2015

- Conduct Fire and Safety Inspection of Facility
- Conduct facility tour for Board of Trustees
- Host Open-House and Family Orientation
- Deliver Professional Development to all staff
- Prepare facility for grand opening
- Staff conduct home visits or in-school meetings to build relationships with families
- Kindergarten screening and orientation
- Host Annual Family Picnic at Kings Park, Newport, RI
- Grand Opening/First Day of School

Section XI. Variances

The founders of Ida Lewis Leadership Academy will not be requesting variances from statutes or regulations.

Section XII. Finance and Budget

Attached as Appendix H, the founders of Ida Lewis Leadership Academy have included our five-year budget projection that is reflective of our organization's programmatic and operational expenses. Based on this five-year projection, which includes an aggressive fund-raising campaign, Ida Lewis Leadership Academy will maintain financial sustainability and thrive as a viable organization. We consulted with various financial experts from other charter schools as well as stakeholders from the finance industry in formulating our budget. For example, the Business Manager of Compass School shared the operating budget with our team. The student enrollment of Compass School is currently 161 and Ida Lewis Leadership Academy will have a student enrollment of 180 when it reaches its full capacity. Given the relatively small student enrollment, we realize the importance of having a lean and efficient staff that performs numerous roles within our organization.

We employed several creative strategies to minimize our operating costs. For example, the specialist teachers and the school nurse will all work part-time. Given our small student enrollment and the fact that all of our teachers will be certified in CPR, the school nurse will work five hours per day. We will also be assigning our specialist teachers staggered hours as compared to our classroom teachers. Our specialist teachers will be working 30 hour week from 12:00-6:00 in order to accommodate the classroom teachers' planning periods and provide after-school enrichment. Our teaching assistants will be working no more than 25 hours per week from 9:00-2:30.

We will also have a part-time Finance Officer who will work 5 hours per day at a total of 25 hours per week. This person will be responsible for the fiscal oversight of the

organization as well as the coordination of outside contractors as needed. Our Finance Officer will be well versed in RIGL § 16-77.2-8 and he/she will develop a calendar that reflects when financial reports and documents are due to RIDE to ensure that we are in full compliance with all laws and regulations. Our Finance Officer will present our operational budget to our Board of Directors for approval on a yearly basis. Following the Board's approval, the Finance Officer will submit a copy of the annual budget to the RIDE Office of Charter Schools. Additionally, our Finance Officer will hire an independent accounting firm to conduct an annual budget, which will subsequently be shared with the Finance Committee, Board of Trustees, and the RIDE Office of Charter Schools. Finally, our Finance Officer will share the budget with our staff to deepen their understanding of our fiscal realities. The objective in sharing the annual budget with the entire staff will be to cultivate a culture of transparency and to generate strategies and ideas in terms of our improving our financial viability and sustainability.

The Finance Committee will collaborate with the Finance Officer and the Executive Director to ensure that our estimated expenses including the lease of our facility, utilities, maintenance, as well as operational costs do not place a financial burden or strain on our organization. We will also work together to ensure items that are purchased are aligned to our mission and absolutely essential to our programmatic requirements. All purchases will be closely monitored and recorded on spreadsheets for accountability purposes. A bidding process will be initiated for outside contractors to ensure that we are being charged fairly for services rendered.

From the moment our doors open, we will launch a robust fundraising campaign. Our Family Engagement Officer will work closely with our Parent Teacher Organization and our Executive Director to pursue fund raising initiatives that will yield consistent revenue for our organization. We will also be pursuing a variety of grants to further support and enhance our academic and enrichment programs. Finally, we will continually expand our community partnerships as well as our pool of philanthropists to further promote our financial sustainability.

The five-year budget projection included in our Appendices reflects estimated total operating revenues of \$2,059,158.79 for our first year and total expenditures of \$1,842,957.90. Our revenues are based on local and state funding for per pupil allowances, the Charter Schools Program Grant, private grants, and funding for Title I, Title III, and IDEA generated by our projected student enrollment. We anticipate that there will be a significant amount of Title I, Title III, and IDEA funding since we are providing this population with a preference in the lottery. In addition to the operating revenues reflected in our five-year budget projection, we intend to launch an aggressive fund-raising campaign as well as extensive outreach to philanthropic entities within and beyond Newport County. Our operating expenditures consist of costs associated with school management, program/operations management, instruction, instructional support, operations, community services and other obligations such as benefits and insurance. Our budget reflects the salary of a half-time Principal and a half-time Executive Director which will essentially be one person performing both roles. The salary listed under Deputies and Administrators is a 25 hour/week Finance Officer. Our Business Operations line item includes the purchase of payroll software as well as outside accounting services to complete our annual audit. Our estimated legal fees

are based on the fees reflected in a local charter school that is the same size as Ida Lewis Academy. The expenditures listed under Information Management and Technology (\$10,000) includes the purchase of our Student Information System as well as other non-pupil related technology licenses and software to support our operations. Our operational expenditures including facilities maintenance, building upkeep, maintenance contracts and an estimated \$12,000/month lease total \$418,682.00.

We calculated our teacher salaries based on Step 4 of the Newport Pay Scale and we included an annual 2% increase in salaries. In the event that teachers beyond Step 4 are hired, we will adjust our budget accordingly. Our specialist teachers (STEM, Spanish, Creative Arts, and Information Media Technology) will be .6 employees working a total of 25 hours per week and we calculated their salaries accordingly. Given our small student enrollment, it was not necessary to hire full-time specialist teachers.

Our lean budget reflects a \$216,200.89 surplus during our first year of operation, a \$522,841.64 surplus the second year, a \$826,244.14 surplus the third year, a \$1,045,070.26 surplus the fourth year, and \$1,327,175.85 surplus during our fifth year operation. This surplus will contribute to our financial sustainability over time and it will allow us some flexibility in allocating more funding directly into enhancing our academic and enrichment programs.

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Wendy Randle
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North Kingstown, RI 02874
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CERTIFICATIONS

- Rhode Island Department of Education Professional Certificate #3348, Building Level Administrator PK-12 issued June 21, 2012
- Massachusetts Department of Elementary & Secondary Education Educator's License #1337526 issued on January 11, 2010
- South Carolina State Board of Education Educator Certificate #249278 issued on March 17, 2010

EDUCATION

Northeastern University, Boston, Massachusetts

Doctorate – Pending the completion of Dissertation

Major: Educational Leadership

GPA: 4.0 out of 4.0

Honors: summa cum laude

Providence College, Providence, Rhode Island

Master's Degree - 5/2005

Major: School Administration

GPA: 3.95 out of 4.0

Honors: summa cum laude

Roger Williams University, Bristol, Rhode Island

Certification - 12/1999

Major: Teacher Certification

GPA: 3.95 out of 4.00

Honors: summa cum laude

Salve Regina University, Newport, Rhode Island

Bachelor's Degree - 5/1994

Major: Administration of Justice and Politics

Minor: Spanish

GPA: 3.89 out of 4.0

Honors: summa cum laude

WORK EXPERIENCE

Interim Head of School – Paul Cuffee School, Providence, RI:

July, 2013-July, 2014

- Cultivated a culture of continuous school achievement
- Engaged the leadership team in learning walks focusing on academic rigor
- Collaborated with consultants on Common Core curriculum alignment
- Served as an ex officio member of each Board Committee: Finance, Human Resources, Facilities, Committee on Trustees and Governance, and the Strategic Planning Committee
- Prepared quarterly presentations for the Board of Trustees
- Engaged in ongoing two-way communication with all stakeholders
- Ensured that time, financial resources, and human resources were maximized across three divisions
- Engaged the leadership team in ongoing analysis of our five-year budget projections and follow-up discussions on financial sustainability
- Collaborated with the Human Resource Coordinator in refining the hiring process
- Conducted a staffing audit to ensure that all classroom teachers were certified and highly qualified
- Worked with outside contractors including legal counsel and a project manager to address facilities issues
- Worked with the Technology Department to adopt a new Student Information System
- Engaged with various groups of stakeholders to recalibrate and identify the characteristics of the PCS culture that make our organization unique
- Coordinated Family Wellness Night with the Wellness Team
- Launched the Diversity Team
- Assisted with the coordination of the Middle School Principal Search Committee

Principal – Paul Cuffee Lower School, Providence, RI:

June, 2012-June, 2013

- Cultivated a conscious community of continuous learning for all faculty staff and students
- Fostered a culture of high expectations for all students and a culture of respect for all community members and guests
- Established an instructional vision and focused plan for improving student achievement
- Supported teachers in improving their instructional practice
- Assisted the Head of School and other administrative team members in determining and implementing strategic institutional initiatives and K-12 programs and events
- Hired and evaluated faculty members and implemented RI Model Teacher Evaluation and Support System
- Chaired School Improvement Team and helped to develop, implement and revise

- School Improvement Plan with staff, parents, and community members
- Coordinated professional development for all faculty and staff
- Collaborated with Business Manager and Head of School on devising and revising budget
- Ensured that the socio-emotional needs of our students were met
- Managed the Student Support Systems RIDE visit to Paul Cuffee School
- Assisted with mandated reporting to RIDE
- Articulated and supports the School's mission and vision while understanding and promoting its history
- Delivered presentations in relation to student achievement at Board of Trustees meetings
- Increased family engagement through the coordination of Family Wellness Night and Family Math and Literacy Night
- Implemented RIDE initiatives with fidelity
- Represented Paul Cuffee School at RIDE meetings

Principal, Department of Defense Education Activity - Bolden Elementary/Middle School, Beaufort, SC: July, 2011-June, 2012

- Served as the instructional leader by modeling research-based best practices
- Planned and delivered professional development based on students' and teachers' needs
- Established and led grade-level professional learning communities
- Evaluated teacher performance and provided constructive feedback for improvement
- Conducted daily classroom observations to collect data for school improvement
- Cultivated a culture of excellence focused on enhancing teaching and learning
- Created a sense of urgency and emphasis on school improvement
- Restructured the master schedule to maximize teaching and learning time
- Solicited feedback from all stakeholders for the purpose of revisiting the vision statement
- Utilized multiple vehicles of communication to keep families and the Tri-Command informed resulting in improved perception data
- Engaged in data-driven decision making by reviewing, analyzing, and proposing interventions based on local and national student achievement data
- Created a welcoming environment where parents feel valued and appreciated
- Utilized parents in meaningful and purposeful ways
- Increased parent involvement and participation through the coordination and implementation of Family Math Night, Family Wellness Night, Family Books for Bingo Night and a Family Workshop on Bullying Prevention
- Developed and implemented winter and spring middle school sports programs
- Implemented a school-wide positive reinforcement system
- Enforced the school-wide discipline and uniform policies
- Celebrated students' academic achievements on a quarterly basis

- Improved student attendance percentages by closely monitoring day-to-day attendance and maintaining contact with parents whose children are chronically absent
- Coordinated counseling services for students through the Military Family Life Consultant
- Served as the ambassador of the school by meeting regularly with the Commanding Officers of Marine Corps Air Station Beaufort and Naval Hospital Beaufort
- Guided and supported teachers in addressing the needs of students exhibiting undesirable behaviors
- Advocated for students with special needs by increasing teachers' disability awareness and sensitivity

Director, Riverview Charter School, Beaufort, SC: May, 2010 - June, 2010

- Represented Riverview Charter School at Beaufort County School Board Meetings
- Presented student achievement data to the Riverview Board of Directors
- Enforced student discipline
- Hosted a volunteer appreciation ceremony
- Collaborated with the Professional Development Committee in planning professional development

June, 2010 -July, 2011 – Employment gap attributed to military spouse relocation; this time was utilized to complete coursework towards fulfillment of my doctoral candidacy and pursue AFAA Group Fitness Certification

Principal, South Elementary School, Somerset, MA, 07/2005 – 05/2010

- Facilitated the formulation and implementation of the strategic plan
- Supported staff members with professional growth
- Evaluated the performance of staff members
- Ensured the integrity and quality of instructional programs
- Utilized data to make educationally sound decisions in relation to curriculum and the orderly operation of the school
- Monitored student achievement
- Developed individualized student success plans based on performance data
- Coordinated extended-day services for at-risk students
- Conferred with teachers and other non-instructional staff regarding school initiatives
- Formulated the annual school budget
- Provided safety and security for students, staff and visitors
- Ensured the implementation of the school-wide discipline plan
- Prepared the master schedule
- Maintained cumulative records of students and staff

- Planned, organized and implemented school activities and programs
- Coordinated support services including maintenance, security, food services, and recreation programs
- Conducted routine building inspections
- Planned and supervised fire drills and emergency preparedness programs
- Supervised staff in accordance with school district policies and state legislation
- Developed my own professional growth plan which aligns with district strategic goals
- Cultivated partnerships with local businesses
- Served as the community relations ambassador for the school

Grade 1 Grade Teacher, Coggeshall Elementary School, Newport, RI, 09/2000-06/2005

- Maintained currency in the curriculum
- Planned differentiated instruction based on students' individualized needs
- Cultivated a classroom environment conducive to optimal learning
- Implemented research-based instruction
- Promoted high standards and expectations for student achievement
- Demonstrated sensitivity and appreciation for equity and diversity
- Fulfilled professional responsibilities
- Engaged families in two-way communication regarding student performance
- Collaborated with colleagues and specialists to improve the instructional program
- Participated in professional development initiatives
- Facilitated professional development sessions
- Supervised student teachers
- Served on interview committees
- Participated in the strategic planning process
- Served as the Parent Teacher Organization Liaison
- Coordinated and extended-day program for at-risk learners

Legal Secretary, Philip Eiker Law Office, Newport, RI, 10/1996-10/2000

- Created legal documents and affidavits for foreclosures, bankruptcies and evictions
- Prepared files for District and Superior Court proceedings
- Coordinated evictions with the Sheriff's Department

Correctional Officer, Federal Bureau of Prisons, Danbury, CT, 10/1994 - 10/1996

- Supervised inmates in their living quarters and work assignments
- Provided a safe and secure environment for staff, visitors, and inmates
- Conducted daily fire, safety, and security inspections
- Searched inmates' living quarters for contraband
- Qualified on required firearms

- Certified in self-defense tactics
- Trained new staff members

JOB RELATED TRAINING AND ACCOMPLISHMENTS

- *Leader in Me* Training on the *7 Habits of Highly Effective People*
- Handle with Care Training
- Research for Better Teaching – Teacher Evaluation Course
- Classroom Walk-through Training – Providing Specific Feedback
- Practical Strategies for Working Successfully With Difficult Students
- Massachusetts Department of Education Enhancing Education Through Technology
- Turning Around Schools and School Systems
- Nonviolent Crisis Intervention
- Spelling Instruction Grades 2-5
- Leading for Literacy Administrators Institute
- Preventing Disruptive Behaviors through an Response to Intervention (RTI) Model
- Positive Behavior Intervention Supports (PBIS) Training
- Math Workshop Model Training
- Readers and Writers Workshop Training
- Fountas and Pinnell Benchmark Assessment System (BAS) Training
- Improving Mathematics Instruction for All Students
- Brain Science and Brain Training
- Creating Writers through 6-Traits Writing
- Differentiated Instruction Training
- Marzano's Nine Strategies to Improve Student Achievement
- Served as a mentor for two aspiring principals
- Served as a member of the District-Wide Technology Committee

LANGUAGES: Spanish

Spoken: Intermediate

Written: Intermediate

Read: Intermediate

REFERENCES

Russell Carey, President of the Paul Cuffee Board of Trustees

Phone Number: (401) 965-6820

russell_carey@brown.edu

Michael Obel-Omia, Interim Director of Compass School

Phone Number: (617) 794-4502

publiusrex35@yahoo.com

Richard Medeiros, Superintendent, Town of Somerset

Phone Number: (508) 324-3100

Email Address: medeirosr@somerset.k12.ma.us

83 Westhill Drive
Cranston, RI 02920
401-595-6021
tommarae@yahoo.com

Executive Profile

Accomplished Executive with demonstrated ability to deliver results.

Skill Highlights

- I am extremely attentive to detail
- I can take instruction well
- I am a self-starter and motivator
- I am dependable and reliable
- I have a professional demeanor and work very well with others
- I have very strong grammar skills and communicate well with others
- I am a very fast learner
- I am proficient in Microsoft Outlook and Microsoft Office, including Word and Excel, and have excellent computer skills

Core Accomplishments

I am a published author. My first novel, *Diva On My Doorstep*, was published in April of 2010.

I started an online computer parts business and work very well with vendors here in the US as well as overseas.

I have a strong sales background and have a lot of experience working with customers.

I am able to handle problems very well.

Professional Experience

May 2012 to Present – Office Coordinator, Home Loan Investment Bank

Home Loan Investment Bank
2 Altieri Way
Warwick, RI 02886

- Report directly to the President and CEO, COO and CFO
- I am to the go-to person for the Bank
- Make all travel arrangements and coordinate site visits for President of the Bank
- Order and follow up on all commercial appraisal and environmental reports

- Perform wire transfers
- Organize weekly pipeline and pre-pipeline meetings
- Prepare monthly compliance reports
- Prepare monthly and quarterly board reports
- Prepare Board minutes
- Organize and schedule meetings and reserve conference rooms
- Manage Executive's calendars
- Create marketing ads for publication in the Providence Journal
- Work in the highest level of confidentiality
- Order supplies

August 2009 to May 2012

Owner, InverterSolutions.com

Johnston, RI

- Work with domestic and international vendors to order parts
- Sales, both domestic and international
- Prepare products for shipment

September 2001 to May 2009

Co-owner of ProvidenceData

Perry, ME

1990 – 2001

RCY Company

Vice President

- Managed 10+ employees
- Handled company billing
- Worked in sales and with customers on a daily basis
- Fixed income specialist

Education

Graduated **Valedictorian** from Salve Regina University in 1994 with a bachelor's degree. I had a double major in politics and economics.

Other

Member of the Rhode Island Association of Authors

Mary A. Caporelli

97 Edison Street, Warwick, Rhode Island 02889

(401) 523-7217

macaporelli@aol.com

Education

Concordia University

Portland, Oregon

Ph.D. Candidate - All But Dissertation

Major: Transformational Leadership

Attended January 2013 to Present

University of Rhode Island

Kingston, Rhode Island

Master of Arts

Major: Educational Leadership/School Administration

GPA: 3.880

Graduated January 2003

Degree conferred January 2003

Rhode Island College

Providence, Rhode Island

Bachelor of Arts

Major: Education

GPA: 3.800

Graduated January 1998

Degree conferred January 1998

Experience

Paul Cuffee Charter School

Administrator/Consultant

Providence, RI

Dec 2013 - Managed the day-to-day activities supporting students and teachers within an urban charter school, including curriculum development and alignment of instruction and assessment to the CCSS, professional development in instructional strategies, CCSS implementation, PBGRs, formative assessment, classroom management and focused support on strategic planning, school improvement, diversity, proficiency.

Supervisor: Wendy Randle, Head of School (401) 453-2626

Experience Type: Public School, Full-time

Concordia University

Professor Graduate School of Education

Online

Jul 2011 – Present Online Professor teaching within the Graduate School of Education to support learning for current and future educators. Subjects taught: Educational Leadership, Climate/Culture, Learning Theory, Special Populations, Instructional Strategies, Community of Learners.

Supervisor: Dr. Mary Jane Pearson (650) 479-3207

Experience Type: Other, Part-time

RI Nurses Institute Middle College

Director

Providence, RI

Jul 2013 - Dec 2013: Responsible for the development and facilitation of academic programs and opportunities within a college-prep, urban charter school.

Reason for leaving: Pursued an opportunity elsewhere

Supervisor: Keith Oliviera (401) 680-4900

Experience Type: Public School, Full-time

Rhode Island School Districts

Educational Consultant

Rhode Island

Aug 2011 - Jul 2013: Educational Consultant/Specialist

Responsible for guiding reform efforts and transforming beliefs and mindsets by demonstrating consistently high expectations for all learners and leaders, modeling “whatever it takes” habits of mind, creating alternative programs and pathways, and facilitating the action steps needed to create positive opportunities for our state’s traditionally underserved students. Designing and facilitating Professional Development surrounding academic and technical needs (CCSS, PBGR, School Culture, Collaboration, Educator quality/accountability structures, Instructional Strategies, IMS, SLO, PGG)

Supervisor: District Leadership (401) 523-7217

Experience Type: Other, Full-time

Rhode Island Department of Education

Transformation Specialist

Providence RI

Aug 2010 - Aug 2011: Transformation Specialist, RI Department of Education, Providence, Rhode Island
Recruited to implement the state’s Protocols for Interventions in our Persistently Lowest Achieving Schools (PLAs), Successful facilitation/distribution of 5+ million in funding and implementation of Transformation Model

- Academic support for Rhode Island’s Persistently Lowest Achieving Schools (PLAs)(CFHS,PPSD)
- Coordination of all Transformation Team activities and all RIDE/PLA District communications
- Researched, developed, and presented presentations on a wide variety of topics related to school reform and turnaround at public forums and to stakeholders, statewide
- Researched and supported the implementation of f alternative settings and structures.
- Academic and technical support at RI Training School, developed Transition Protocols.
- Management of all Transformation Office projects under the Race to the Top Initiative
- On-site leadership and support of all services and programs at RI School for the Deaf and Hard of Hearing.
- State-wide Special Ed Programming advisor addressing readiness level distinctions and PBGR.
- Academic advisor for RI Charter School applications and renewal visits.
- Review, approve, and monitor implementation of PLA School Reform Plans.
- Facilitation of School Improvement Grant and District Negotiated Agreement funding applications
- Developed and supported facilitation of state-level Requests for Proposals and Letters of Interest
- Identification and solicitation of vendors through Requests for Proposals and Letters of Interest
- Identifying and sharing best practice across schools and districts (Turnaround, CCSS, SLO, PPG, IMS)

Reason for leaving: Opportunity to directly support student learning, state-wide, through direct collaboration. Opportunity to impact educator quality through participation in on-line education program

Supervisor: David Abbott, Deputy Counsel (401) 222-8703

Experience Type: Other, Full-time

Warwick School Department

Assistant Director of PBGR, Warwick, RI

Aug 2009 - Aug 2010: Led the reform initiatives surrounding the RIDE mandated Proficiency-Based Graduation Requirements (PBGRs), responsible for all communication regarding the development of structures, protocols, and procedures for full implementation across all secondary schools, inclusive of elementary level, families, and community stakeholders. Responsible for full integration of technology for

presentation and assessment and PD for Administrators, Coordinators and Directors.

Improvement: District commended by RIDE for accelerated movement toward reaching PBGR mandates.

- Developed structures, protocols, and procedures for full implementation of the RIDE mandates.
- Facilitated alignment of curriculum, instruction, and assessment to standards..(GLE-GSE/CCSS)
- Aligned Special Ed Regulations to PBGR, ensuring quality programs for special populations.
- Developed a Proficiency Profile (a data warehouse to support sufficiency/proficiency decisions).
- Coordinate Commissioner's Visit (Sept2009) and Commissioner's Review (Feb2010)
- Planned and facilitated all PD in WSD Diploma System and Richer Picture.
- Planned and facilitated PD in ILP and Comprehensive School Counseling (ES/JHS/HS)
- Identified gaps in curriculum alignment and created courses to address gaps and meet expectations and individual needs. (Technology Gateway, Technology Basics, Civics)
- Planned and facilitated communication of RIDE mandates and WSD Diploma to all stakeholders.
- Supported planning and facilitated judge training for Senior Project.
- Wrote \$900k RITTI Grant (2009, 2010) and supported all aspects of training/facilitation.
- Supervised and supported school-based GBP Coordinators
- Led Principals, Coordinators, and Directors in District Level Professional Development
- Designed and facilitated Professional Development toward meeting school-based academic goals.
- Contributed to School Board, Superintendent's Cabinet, and District Strategic Planning

Reason for leaving: Recruited by the Rhode Island Department of Education to lend academic support to the state's Persistently Lowest Performing Schools.

Supervisor: Denise Bilodeau, Dir/Dr. Horoschak, Superintendent (401) 734-3000

Experience Type: Other, Full-time

Warwick School Department

Principal

Warwick, RI

Aug 2007 - Aug 2009 August 2007-August 2009: Principal, Samuel Gorton Junior High School, Warwick, Rhode Island

Recruited to model best practices and high expectations for all learners toward increasing academic achievement. Responsible for all day-to-day operations, revision of all programs, schedules, and budget to create a student-centered learning environment, implemented research-based instructional practices, and facilitated the Professional Learning Community model to build capacity and success.

School improvement: Writing + 18%, Reading +15%, Math + 11% Special-Ed Ref- 43%

- Modeled best practice and high expectations for all learners.
- Developed technology pathways coordinated with high school programs and workforce requirements
- Implemented: Writing Across the Curriculum Program, RTI processes and protocols, DI strategies, Alternative Learning Programs, and Inclusive Classroom Model utilizing co-teaching
- Led analysis of data at Faculty, Leadership, Content, and Team meetings and provided relevant PD.
- Utilized research-based practices for developing programs, and creating master schedule.
- Created a professional community of leaders and learners through book and focus groups, by implementing protocols for LSW and by creating opportunities to build capacity.
- Developed and facilitated opportunities for vertical articulation of learning outcomes between elementary/middle and middle/ high schools, developed transition practices, and alternative programs.
- Facilitated district-wide PD in CPT protocols, Teaming strategies, and lesson design.
- Communicated with and engaged parents and families in meaningful learning experiences through the PTO, school events & other avenues and facilitated You and Your Teen parent awareness program.
- Implemented school-wide behavioral expectations and employed Leading Learner recognition programs.

Reason for leaving: Recruited to work on the District Leadership Team supervising all Secondary Schools in meeting the state-mandated graduation requirements.

Supervisor: Dr. Victor Mercurio, Director of Secondary Ed (401) 734-3000

Experience Type: Public School, Full-time

Providence School Department

Assistant Principal

Providence, RI

Aug 2003 - Aug 2007 September 2006-Aug 2007 Assistant Principal, George J. West Elementary School

School improvement: reclassified from Insufficient Progress to Delay status according to NCLB.

Inclusion model commended by district and modeled throughout ES district-wide.

- Developed Student Support Team for early intervention (K-2), adopted district-wide
- Facilitated participation in Positive Behavior Intervention and Support (PBIS) initiative.
- Introduced Empowering Writers Program, school and district-wide.
- Consistently monitored instruction through Learning Walks (LW) and provided supportive feedback.
- Supported quality instruction through authentic staff evaluations, ongoing dialogue, and reflection.
- Facilitated SMART School program to unify vision of success.

August 2005-August 2006: Assistant Principal, Nathan Bishop Middle School

Created and maintained a safe and caring environment for learning with a high level of authentic family engagement, teacher leadership, and student-centered programs through creative planning and opportunity.

School improvement: AYP, Retentions -50%, Attendance +27%, Special Education Referrals - 32%.

Conduct referrals 22% to 7%

- Created and monitored researched-based alternative programs/pathways
- Facilitated data analysis and implementation of student support through DI, PLPs and RTI.
- Completed staff evaluations, introduced protocols for SIT, MDT, and Team meetings.
- Worked collaboratively with a Turn-Around facilitator to provide PD and ongoing support.
- Provided counseling for at-risk students, and implemented inclusive programs for special needs students.
- Maintained a high level of authentic family engagement through creative planning and opportunity.
- Facilitated student focus groups, attended and supported after school activities; developed HIP-HOP Club
- Scheduled all teachers and students, supervised students, monitored attendance, and created Behavioral Expectations and Responsibilities Plan.

Reason for leaving: Recruited by Warwick School District to lead their Lowest Performing Middle School

Supervisor: Gary Morroch/Dr. Frances Gallo (401) 456-9000

Experience Type: Public School, Full-time

Providence School District

Assistant Principal/Director/Educator

Providence, RI

Aug 1999 - Aug 2005 June-August 2003, 2004 Director, Summer Secondary Credit Recovery Program

Program improvement: 100% successful completion of program over two years.

- Facilitated all aspects of program (teacher training, registration and attendance, implementing and monitoring student learning and progress using PLATO, supporting special programming to meet student need).

June 2003-August 2005 Assistant Principal: Windmill Street Elementary School

School improvement: reclassified from Low to Moderately-performing school according to NCLB.

- Recipient of the Reading First Grant

Michelle Casey

98 Terrace Road · Medford, MA 02155 · (781) 929-3518 · E-mail caseymichelle@comcast.net

Demonstrated Sales Experience Including

- Outstanding selling skills with a proven ability to develop new business, exceeding sales and revenue goals
- Proven ability to generate, qualify and follow-up on sales leads
- Expertise in developing and delivering presentations to key decision makers
- Ability to effectively manage a large sales territory
- Strong administrative and writing skills including developing detailed price quotes and proposals
- Experience providing accounts with the outstanding customer service necessary to capture repeat and referral business

Comprehensive Sales, Marketing & Customer Service experience including:

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> · New Business Development · Developing & Delivering Presentations · Lead Generation & Qualification · Key Account Management · Effective Business Correspondences | <ul style="list-style-type: none"> · Consultative Sales Techniques · Evaluating Sales Team Performance · Detail Orientation/Follow-Up · Building Sales Distribution Channels · Securing Orders & Contracts | <ul style="list-style-type: none"> · Territory Management · Forecasting · Solution Selling · Price Negotiations · Closing Techniques |
|--|---|---|

Noted in Evaluations:

“...passionate, innovative, relentless and competitive, and we have fun.” Michelle is very passionate about what she does. She speaks very highly of her customers and cares about the kids that she affects every day. Michelle is very competitive as well. She loves to win and strives to win all the time. But she does like to have fun and she always shares her results and how she goes about her business.”

PROFESSIONAL EXPERIENCE

Client Partner (Territory-New England)
Franklin Covey-The Leader in Me

5/13-Present

- Responsible for working with Schools in bringing The Leader in Me.
- Leadership Model developed for k-12 based on the 7Habits of Highly Effective People

Sr. Account Manager (Territory - VA, DC, MD, TN)
Lexia Learning Systems, Inc. Concord, MA

9-09-5/13

- Develop and manage all aspects new account generation for sales of this high tech software program
- Exceed sales goals
- Elected to be on the committee to create and develop corporate guidelines
- Effectively utilized web-based tools to present the Lexia Reading Program to school districts
- Initiated successful collaboration and partnerships with organizations within the territory
- Worked with each territory State Department, applied and approval for vendor list in DC, VA, MD and TN
- Created and implemented numerous marketing campaigns for each territory, including email, direct mail, regional advertising both radio and web
- Created opportunities to increase market share

Selected Accomplishments

- 2012 - Top Revenue Producer for the Lexia Direct Sales Team-8 member team
- 2011 - Top Revenue Producer for the Lexia Direct Sales Team-8 member team
- 2011 - Recipient of President Award
- 2010 - Exceeded revenue target by 153% of quota, closed 6 district wide opportunities
- Sales over \$150K Baltimore City Public Schools, Baltimore Maryland; Center City Public Charter Schools, Washington DC, Chattanooga, Tennessee

- Initiated this client base from ground level (zero market penetration in territory)
- Created all lead generation

Michelle Casey

Manager of Business Development 2008

Geneva Group, Belmont MA

Responsible for the marketing and sale of an Enterprise Resource Planning system to the New England Territory

Inside Sales Manager/Northeast Territory 2006-2008

Houghton-Mifflin, Wilmington, MA

- Effectively sold math & reading solution software to key decision makers within the northeast region's school systems.

Regional Account Manager 2004-2006

Progress Software Corporation, Bedford, MA

- Exceeded quota by 128%-2004 & 2005 · Top Quarterly Sales Producer for Q3/Q4-2004 & Q1/2005 · Pro Club Award

Senior Account Executive 2003-2004

Sophos, Inc., Lynnfield, MA

- Developed, implemented and monitored a strategic territory business plan that significantly increases revenues

Channel Account Manager 1999-2002

Intel Corporation, Bedford, MA

- Exceeded quota by not less than 150% in every quarter for three consecutive years · 1999 Top Achiever
- Successfully recruited over 250 new accounts utilizing an aggressive outbound call campaign
- Perk Recognition Award in Q2/2001 MA · Strategically developed the reseller channel

Channel Sales Manager / Government & Educational Markets 1994-1999

Education Sales Manager

Shiva Corporation, Bedford, MA

- Exceeded quota by 125% Q1/1997 and by 104% Q2/1997
- Spearheaded the Shiva Advantage Program targeting government resellers yielding a 90% increase in new accounts

Manager / Direct Sales 1990-1993

Bitstream, Inc., Cambridge, MA

- Exceeded \$1.6M in revenue · 104% of goal · Managed a staff of 5 sales representative

EDUCATION

Masters of Education

Cambridge College, Cambridge, MA

Bachelor of Science – Management

Fitchburg State College, Fitchburg, MA

Professional Affiliations:

2011- Present Arlington Catholic Advisory Board

2010 - Present Medford Boat Club- Executive Board Member, Officer of Capital Planning Committee

Fundraiser / Parent Teacher's Organization - Saint Raphael's School, Medford, MA

Computer Skills:

Microsoft Office Suite · Salesforce · QuickBooks · Several Contact Management Packages

References available upon request

Michael F. Corcoran

2015 Boundary St, Suite 336 ♦ Beaufort, South Carolina 29902 ♦ 843.441.6639
mike@aquaoxfilters.com

Objective

A successful financial management position using my leadership skills, knowledge, and extensive military background to develop, maintain and implement financial services and accountability.

Qualifications

- Proven sales experience in the Securities Industry. Outstanding communication and presentation skills with the ability to represent position with authority and value.
- Held positions of increasing responsibility in management, operations, and training within the Federal Government.
- Extensive policy development, training and problem solving experience in current human resource issues of equal opportunity, prevention of sexual harassment, extremist activities, investigations, and personnel issues.
- Work well with people, both individually and as part of a team.
- Positive attitude reflected in personal determination, discipline, and dedication.
- Highly adaptable. Responds in positive manner to new responsibilities and tasks.
- Excellent written and verbal skills.
- Lieutenant Colonel, United States Army, Retired. War Veteran (service-connected disability, 30%), DD214 available on request.

Areas of Expertise

- | | |
|---|--|
| <ul style="list-style-type: none"> - Sales and Marketing - Public Speaking - Training / Development / Operations - Policy Administration - Safety - Employee / Family Assistance Programs | <ul style="list-style-type: none"> - Office Management - HR Employment Law - Performance Evaluations - Community Relations - Recruiting - Awards / Recognition |
|---|--|
-

Education

Master of Science Degree in Human Resources Management
Troy State University ♦ Montgomery, AL (1994)

Air Command and Staff College
Maxwell Air Force Base ♦ Montgomery, AL (1994)

Bachelor's Degree, Mathematics
The Citadel ♦ Charleston, SC

Professional Experience

2010- Director, Corporate Sales, AquaOx, LLC Water Purifying Systems, Beaufort, SC

- Co-owner of AquaOx, LLC and responsible for the sales and marketing of AquaOx Whole House Water Purification Systems, Nationwide. (www.aquaoxfilters.com), Corporate base Anderson, SC.

Michael F. Corcoran

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2006- Corcoran Financial Services, Inc., Financial Services Representative,
Beaufort, SC

- As a sole proprietor and licensed registered representative listed with FINRA, responsible for sales and implementation of all aspects of Financial Services. Qualified member Million Dollar Round Table. Retired representative New York Life, active with MassMutual Financial Group.

2000-2006 First Command Financial Services, Registered Representative and Agent,
Beaufort, SC and Newport, RI

- As a sole proprietor and licensed registered representative listed with FINRA, responsible for sales and implementation of all aspects of Financial Planning. Received numerous sales recognition awards (top 2%).

1999-2000 Executive Officer
United States Army, Bristol, RI

- Responsible for the operations and training of subordinate units consisting of 182 personnel. Exercise and evaluate war fighting capabilities. Develop, plan, and coordinate subordinate units training mission.

1998-1999 Chief Force Protection
Sarajevo, Bosnia

- Develop, review, and recommend revision of plans, policies and procedures for all aspects of Force Protection across the theater. Conduct security and safety inspections of NATO facilities. Recommend changes to threatcon levels and coordinate subordinate counter terrorism measures throughout the Multi-National Division areas within Bosnia.

1997-1998 Chief Operations Officer
United States Army, Birmingham, AL

- Responsible for the operations and training of subordinate units consisting of 508 personnel. Exercise and evaluate war fighting capabilities. Develop, plan, and coordinate subordinate units training mission. Budget personnel manpower authorizations in excess of \$500,000.

1994-1997 Security Review Officer
Office of the Secretary of Defense, Washington, DC

- Performed duties for the Assistant Secretary of Defense as his representative with full authority to review and independently clear defense information for release to the public and Congress. Ensured that material released was not in conflict with established defense and national policy and did not divulge national security information of great importance to the nation.

Michael F. Corcoran

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1992-1993 Chief Personnel Officer
United States Army, Fort Bragg, NC

- Advised the CEO on all matters pertaining to administration, legal, equal opportunity, and personnel policies for over 6000 personnel. Represented the CEO on a variety of installation level councils.

1991-1992 Operations and Training Officer
United States Army, Fort Bragg, NC

- Trained and managed over 70 instructors, wrote and revised curriculum for high-risk training with an annual base of 1800 personnel. Managed large budget, employee appraisal system, and merit pay system. Coordinated all logistical support.

1990-1991 Plans Officer (Combat/Wartime)
United States Army, Fort Bragg, NC / Persian Gulf

- Planned, coordinated, and integrated all the tools necessary for the successful accomplishment of battle during Operations Desert Shield and Desert Storm, War in the Persian Gulf. This duty served over an 8 month time span to include the rigors of combat flying during the air operations and as a command and control representative to the Commanding General, 18th Airborne Corps, and later as his fire support representative during the ground war. Influenced operations that precluded the loss of life and equipment during combat actions.

1989-1990 Executive Officer
Central Army Group, NATO, Heidelberg, Germany

- Served as the Executive Officer to the Operations Officer of a corporation in excess of 300,000 personnel. This corporation had the sole responsibility to defend Europe against communist aggression. As the principle assistant to the Operations Officer, responsibilities included the execution of his operations, plans, training, and other staffing and operations within the corporation. Personnel manager for 60 executives within the operations division.

Professional Skills

Proficient in Windows/MS Office, Word, Powerpoint, Excel and Access.
 Top Secret Security Clearance (SCI) with Special Background Investigation (currently inactive).
 Licensed Series 6 and 63 (Securities).

Military Awards and Decorations

Legion of Merit, Bronze Star Medal, Defense Meritorious Service Medal, Meritorious Service Medal (3rd Award), Air Medal, Joint Services Commendation Medal, Army Commendation Medal (4th Award), Joint Service Achievement Medal, Army Achievement Medal (2nd Award), National Defense Service Medal, Armed Forces Expeditionary Medal, Army Service Ribbon, Overseas Service Ribbon (3rd Award), NATO Medal, Kuwait Liberation Medal (Saudi Arabia), Parachutist Badge.

Overseas Assignments

Germany (10 years), Italy (1 year), Southwest Asia (1 year). Readily available for extensive travel.

Michael C. Obel-Omia

105 County Road Barrington, Rhode Island 02806
617-794-4502 (cellular)
mobelomia@gmail.com

Summary of Qualifications

A versatile, dynamic, experienced leader who combines a sincere interest in, affection for, and loyalty to schools with a demonstrated successful track record in achieving and inspiring excellence both in independent and in charter schools. Reputation as a performer with appropriately high standards for self, colleagues, students, and community, while supporting faculty with professional growth opportunities and uplifting students with singular experiential opportunities. Visionary collaborator who firmly believes in school mission and makes students' needs, their intellectual, academic, artistic, athletic, social, and emotional growth, his lodestar when organizing and implementing institutional priorities.

Professional Experience

The Compass School (2013)

Kingston, Rhode Island

Interim Head of School: public charter school founded in 2002 that uses a constructivist/project-based approach to build the foundation that will develop each child's cognitive, social, physical, emotional, and reflective being. \$2.5 M budget, 40 Faculty and Staff, 160 students K-8.

University of Rhode Island (2013)

Kingston, Rhode Island

Adjunct Professor of Education

Paul Cuffee School (2010-2013)

Providence, Rhode Island

Head of School: public charter school founded in 2001 that is the highest performing fully urban school in state. Spread across three buildings in three separate locations in Providence, the School expanded to high school in July 2010 and will graduate its first high school class in June 2014. \$11M budget, 145 Faculty and Staff, 689 students across K-11 (increased from \$8M budget and 90 Faculty and Staff in July 2010)

- Opened High School, secured , remodeled, and opened building in 2 months' time, and oversaw growth
- Coauthored successful \$400,000 EPA Grant and \$249,000 RIDE Expansion Grant, managed and completed the execution of the EPA Grant in record time, 6 months, building a synthetic turf field; selected by EPA to lecture about the grant writing and execution of grant in Boston
- Created opportunities for students and Faculty, collaborating with Rhode Island College for RIC faculty and recent graduates to tutor students for the NECAP's; collaborated with University of Rhode Island for rising seniors to earn credits at URI and to study for 3 weeks in Cape Verde; connected students to Great Books Program at Amherst College; secured professional development from Roger Williams University for Faculty
- Surpassed the fundraising goal 2 of 3 years and obtained 98% of the goal the third year
- Redesigned website, making it distinct, dynamic, and user-friendly
- Secured 5 year Charter renewal for School in second year

William Penn Charter School (2009-2010)

Philadelphia, Pennsylvania

English Teacher, Middle School Diversity Coordinator, Coach: independent school that honors difference and seeks God in each person. Taught 6th and 8th grade English, coached middle school football, wrestling, and lacrosse, wrote essays for website, lectured in high school classes, and coordinated diversity efforts in the middle school, including Dr. Martin Luther King Jr. Service Day

The University School (2006-2009)

Hunting Valley, Ohio

Head of the Hunting Valley Campus and Upper School Director: independent, all boys' school, 221 acre campus that has a trout pond, maple syrup production shack, and exceptional athletic facilities. 1M budget, 105 Faculty and Staff Members, 420 boys in 9-12

- Oversaw a needed change in grading system led by Academic Dean and Curriculum Committee
- Supported a student-led community service program that redefined service
- Initiated an exchange with the *Maru a Pula* School in Gaborone, Botswana
- Developed a successful annual Diversity Day with national speakers, classes, and seminars

The Roxbury Latin School (1990-2006)

West Roxbury, Massachusetts

Director of Admission, Dean of Students, Director of Summer School Orientation Program, English Teacher, Member of College Committee, Coach: Roxbury Latin School seeks to prepare students intellectually, morally, and spiritually for service in the world as leaders of integrity and conviction

- Increased applicants by 36%, from 280 to 380 and had 100% yield of accepted students
- Diversified, both racially and socially-economically, the applicant pool
- Encouraged students in non-AP class to take test, and their success eventually led to School ridding the junior year of a specific AP English class

Perkiomen School (1988-1990)

Pennsburg, Pennsylvania

English Teacher, Assistant Varsity Football, Wrestling, and Baseball Coach, Dormitory Parent: a school that inspires students to risk becoming their best, Perkiomen showed me that knowing the whole child is best

Education:

M.A.	The Bread Loaf School of English, Middlebury College, 1992
A.B.	Middlebury College, 1988, Major: American Literature; Minor: History

Professional Accomplishments and Awards:

- Academic Director, Great Books Summer Program, Amherst, Massachusetts, Summers 2006-Present
- Teacher in the Summer Leadership Institute at Wilmer Hale Law Firm, Boston, Massachusetts, Summers 2000-Present
- National Endowment for the Humanities:
 - Shakespeare in Ashland*; Southern Oregon University, Ashland, Oregon, June 2000
 - Classic Texts of Social Analysis*; City University of New York, Brooklyn, New York, July 1994

Shakespeare in Ashland; Southern Oregon University, Ashland, Oregon, July 1993
Shakespeare's England; The Huntington Theatre, Boston, Massachusetts, February 1993

Selected Community Involvement/Public Service:

- Trustee, Middlebury College, Middlebury Vermont, 1997-2012
- Trustee, WaterFire, Providence, Rhode Island, 2013-Present
- Trustee, Great Lakes Shakespeare Theatre, Cleveland, Ohio, 2007-2009
- Trustee, The Learning Project Elementary School, Boston, Massachusetts, 2004-2006
- Trustee, The Fenn School, Concord, Massachusetts, 2001-2006
- Trustee, Tenacre Country Day School, Wellesley, Massachusetts, 1997-2004
- Trustee, The Robert F. Kennedy Children's Action Corps, Boston, Massachusetts, 1997-2006

Selected Speeches, Lectures, and Published Works:

NPR's "This I Believe," "Keeping Safe" WRNI, Providence, Rhode Island, 11 December 2013
 University of Rhode Island, Kingston, RI, Facilitator, "Honors Colloquium: Talent and Development Program" 26 November 2013
 Pine Cobble School, Williamstown, MA, "Diversifying a Community" 6 November 2013
 Wooster School, Danbury, CT, "I Expect to Pass Through Life But Once" 22 February 2013
The Providence Journal, Opinion-Editorial Blog, "King's Lessons on Greatness and Humility" 21 January 2013
 Pacific Hills School, Los Angeles, California, "Beauty and Perfection are in the Ordinary" 14 January 2013
The Providence Journal, Opinion-Editorial, "Filling Empty Bowls at Cuffee" 23 November 2012
 NPR's "This I Believe," Even Rats Need Love" WRNI, Providence, Rhode Island, 14 November 2012
Education Week, Opinion-Editorial, "Why Bother with Recess?" 9 May 2012
 Pacific Hills School, Los Angeles, California, "The Gift of Gratitude" February 2012
Providence Journal, Opinion-Editorial, "On MLK Day, Stare with Hope at the Stars" 16 January 2012
 NPR's "This I Believe," "Lost Childhood" WRNI, Providence, Rhode Island, 2 November 2011
Providence Journal, Opinion-Editorial, "Red Sox Fans Should Be Grateful" 7 October 2011
Education Week, Opinion-Editorial, "Chipping Away at Pop Culture for Students' Sake" 9 March 2011
 NPR's "This I Believe," "Improving" WRNI, Providence, Rhode Island 2 February 2011
Providence Journal, Opinion-Editorial, "The Need to Disconnect" 19 September 2010
Philadelphia Inquirer, Opinion-Editorial, "Lasting Comfort of *Catcher*" 3 February 2010
 Bryn Mawr School, "Dr. King Jr., John Donne, and Haiti: We Are All in This Together" 14 January 2010
 Great Lakes Shakespeare Theatre, "The Comedy of Errors: More Than Meets the Eye" Cleveland, April 2009
 The Haverford School, "Areté, Diké, Timè, a Cum Laude Address" April 2009
Independent School, "Obama's Election and Education" Spring 2009
Independent School, "How to Team Up with Your Child's Advisor" Winter 2009
Independent School, "The Edifice Complex" Summer 2007
 NAIS People of Color Conference, Presenter, "Socioeconomic Diversity: The Advantages in Diversifying a Community" Seattle, Washington, December 2006
 Maru a Pula School, Gaborone, Botswana, "The Miser" June 2006
 St. Stithians Boys' College, Johannesburg, South Africa, "Tolstoy's Three Questions" June 2006
 NAIS Annual Conference, Panelist, "Expanding Opportunities for Underserved Urban Male Students" Boston, Massachusetts, March 2006
 Middlebury College, "To Lead Them Higher: The Challenge of King's Legacy" Address" January 2006
 Vermont Public Radio Interview, "Dr. Martin Luther King Matters in the 21st Century" January 2006
 NPR's "On Point" Opinion-Editorial, "Why I Vote" 27 October 2004
Independent School, "The Folly and Danger of Ranking" Fall 2004
 NPR's "On Point" Opinion-Editorial, "Dr. Martin Luther King Jr." 19 January 2004
 NPR's "On Point" Opinion-Editorial, "Hip Hop's Political Influence" 5 November 2003
 NPR's "On Point" Opinion-Editorial, "Rush Limbaugh" 7 October 2003
The Boston Globe Opinion-Editorial, "Kobe Bryant and Macbeth" 8 August 2003

Interests:

- Shakespeare: have performed in two Actor's Equity members plays, *The Merchant of Venice* and *King Lear*, at Bread Loaf School of English
- Cycling: cycled across America to raise funds for and awareness of *Nets 4 Life*, July 2009
- Pan-Massachusetts Challenge, August 2008--raised \$10,000 for cancer research
- Wellness and Health: YMCA, certified Group Exercise Instructor: teach indoor cycling classes

Curriculum Vitae

Susan Lee Pasquarelli, Ed. D.

2 Laura Place
Newport, Rhode Island 02840
401-847-1404; spasquarelli@rwu.edu

Educational Background

May 1996	Doctor of Education Language, Literacy and Cultural Studies, Boston University, Boston, Massachusetts
May 1980	Master of Arts, Reading Education University of Rhode Island, Kingston, Rhode Island
May 1973	Bachelor of Arts, English / Education University of Rhode Island, Kingston, Rhode Island

Professional Experience

2010-Present Programs	Chair of Middle/Secondary Education and MA Literacy Roger Williams University
2005-Present	Full Professor of Literacy Education with Tenure Roger Williams University
1998-Present	Associate Professor of Literacy Education with Tenure Roger Williams University
1994-1998	Assistant Professor of Literacy Education Roger Williams University
1994-1999	Literacy Consultant Boston University / Chelsea Partnership
1991-1994	Full time Adjunct Faculty for Graduate Reading Education University of Rhode Island.
1990-Present	Literacy Curriculum Consultant (K-12) Rhode Island districts: Warwick, West Warwick, Bristol / Warren, No. Kingstown, Block Island, Nantucket, MA.
1987-1991	Curriculum Director / Reading Specialist St. Michael's Country Day School, Newport, RI

- 1978-1983 Teacher of English & Reading
Thompson Junior High School, Newport, RI
- 1977-78 Teacher of English & Reading
Aquidneck Island Adult Learning Ctr., Newport, RI

Publications

- Wang, G., Pasquarelli, S., and DeAbruna, L. (2011). The Global Agenda at Roger Williams University, Shanghai, China: *China Higher Education Evaluation*, Vol. 4, page 14-17.
- McCormack, R. & Pasquarelli, S. (2010). *Teaching Reading, K-6: Strategies and Resources for Teachers*. NY: Guilford Publications.
- Pasquarelli, S. (2006). (Ed.) *Teaching Writing Genres Across the Curriculum: Strategies for Middle School Teachers*. Greenwich, CT: Information Age Publishing.
- Pasquarelli, S. (2006). The Practice of Teaching Genre by Genre. In S. Pasquarelli (Ed.), *Teaching Writing Genres Across the Curriculum: Strategies for Middle School Teachers*. Greenwich, CT: Information Age Publishing.
- Pasquarelli, S. (2006). Expository Summary Writing: Comprehension and Composition. In S. Pasquarelli (Ed.), *Teaching Writing Genres Across the Curriculum: Strategies for Middle School Teachers*. Greenwich, CT: Information Age Publishing.
- Pasquarelli, S. (2005). "Invited" Book Review of: Using Data to Support your Reading Program by Emily Calhoun. *Teacher's College Record*, Volume 107 number 11.
- Pasquarelli, S. (2004). "Invited" Book Review of: Collaborative Analysis of Student Work: Improving Teaching and Learning by Langer, G.M., Colton, A.B. & Goff, L.S. *Teacher's College Record*, Volume 106, number 5, 1026-1029.
- Pasquarelli, S. & McCormack, R. (2002). Matching Standards with Substance: Preparing Pre-service Teachers to Teach Literacy. In J. Many (Ed.), *The Literacy Educator's Resource Book: Touchstones from the Teaching Lives of Literacy Scholars*. Mahwah, NY: Lawrence Erlbaum Associates.
- Pasquarelli, S. (1999-2001). *Becoming a Teacher at Roger Williams University*. Bristol, RI: Roger Williams University Internal Publication.

Pasquarelli, S. (1997) Addressing the Rhode Island English Language Arts Frameworks: What is Strategic Reading Instruction? *Rhode Island Reading Review Journal*. Division of the International Reading Association.

Pasquarelli, S. (1997). Using portfolios to assess your own instruction. In J. Barton & A. Collins (Eds.), *Portfolio Assessment: A Handbook for Educators*. Addison-Wesley Publishing Co.

Pasquarelli-Ficke, S. (1994). How the design of portfolios assists students and teachers in assessing literacy processes. *New England Reading Association Journal*.

Published Curriculum Manuals

Pasquarelli, S. and Nantucket, MA teachers. (2004) A research guide for writing a research paper, grades 4,-5. Internal publication, Nantucket Public Schools.

Pasquarelli, S. and Nantucket, MA teachers. (2002) A research guide for writing a research paper, grades 6-12. Internal publication, Nantucket Public Schools.

Pasquarelli, S. and Gould, M. (1997). Water Supply and Conservation: An inquiry-Based Science / Literacy Curriculum. *Environmental Protection Agency*.

Pasquarelli-Ficke, S. & Winsten, K. (1993). *Dinosaurs!*. Publication of the Rhode Island Department of Elementary and Secondary Instruction.

Grants

Rhode Island Foundation. Awarded 10,000. with RI Chapter of American Independent Colleges and University colleagues to create a model for collaboration among our state's teacher education programs; and, design and share a strategy for reforming and improving the state's teacher education programs, 2012-13.

Roger Williams University Foundation to Promote Scholarship and Teaching. Awarded \$3,500. to conduct an action research project entitled, *Passport to Change: What did study abroad do for me?* 2009-10.

Roger Williams University Foundation to Promote Scholarship and Teaching. Awarded \$4604. and a spring 2007 course release to conduct a research project on, " Using multicultural literature to teach cultural diversity and tolerance, 2006-07.

Teacher Quality Enhancement Grant. Awarded 300,000.with RI chapter of RIACTE over 5 years to participate in the Rhode Island Teacher Renewal Project (RITER), 2005-2010.

Roger Williams University Research Foundation. Awarded \$2,000. to conduct a research study on middle school children learning to write a persuasive essay, 2002-03.

Roger Williams University Research Foundation. Awarded \$1,000. with Jessica Skolnikoff to conduct a research study on teachers' effectiveness and middle school writing achievement, 2002.

Rhode Island Department of Higher Education. Awarded \$3,000. to facilitate academic dialogues with RWU math and English partnership faculty to improve the quality of the associations with the School of Education.

Working Wonders II, Rhode Island Department of Education. Awarded \$200,000 with seven other university faculty in Rhode Island to develop new protocols for the performance assessment of pre-service teachers, 1997.

Roger Williams University Research Foundation. Awarded \$1,000. to conduct two qualitative research studies on pre-service teachers' performance assessment, 1997.

Roger Williams University Research Foundation. Awarded \$1,000. to conduct a qualitative research study on secondary education, 1996.

Environmental Protection Agency (EPA). Awarded \$11,000. to design a sixth grade environmental curriculum for science / literacy education, 1995.

Rhode Island Department of Elementary and Secondary Schools. Awarded \$10,000. to develop a 4th grade curriculum on paleontology, 1992.

Selected Professional Conference Presentations

Rome: Art and Culture through a Traveler's Eye.

Annual meeting of The International Journal of Arts and Sciences, Rome Italy. With Mele, K., October 2012.

Integrating Global Learning Outcomes Across the Curriculum and Beyond.

Annual meeting of the National Association of Foreign Student Advisers: Association of International Educators (NAFSA), Kansas City, Missouri. With Wang, G., Abruna, L., June 2, 2010.

Creating a Cultural Renaissance in the Middle School: Using Literature to Teach Tolerance and Diversity.

Annual conference New England Reading Association. With graduate students: Ficke, R., Carney, M., Fall, 2009.

Effective Vocabulary Instruction.

Rhode Island Department of Education Middle School Summit, Providence, RI, April 2005.

Roger Williams University performance assessment of beginning teachers.

INTASC conference, Washington, D.C., January 2002.

Pre-service teachers learn the principles of literacy performance assessment

National Reading Conference, Orlando, Florida, December 2000.

Are we teaching what we say we are? Matching RI Beginning Teachers' Standards to elementary pre-service teachers' portfolios.

National Reading Conference, Orlando, Florida, December 2000.

Matching pre-service teacher portfolios to state standards

RIDE / Salve Regina Professional Development Conference, Newport, RI, June 1999.

The influence of pre-service teachers' self-assessment of strategic reading.

National Reading Conference, Austin, Texas, December 1998.

The influence of teachers' systematic self-assessment on strategic reading.

National Reading Conference, Scottsdale, Arizona, December 1997.

The challenges and benefits of implementing writing portfolios in an urban high school.

New England Reading Association Annual Conference, Providence, RI, Nov. 1996.

Learning together in professional development schools.

Rhode Island Department of Education Professional Development Conference, Providence, RI, Fall, 1996, w / E. LeBlanc, R. Audet, M. Alfano, M. Geoghegan, V. Rozen, D. Laven, RWU faculty.

Teacher educators and pre-service teachers investigate literacy through portfolio assessment.

International Reading Association, New Orleans, LA, April 1996.

Teachers and students co-investigate the writing process through portfolios.

Rhode Island Reading Association, Newport, Rhode Island, November 1995.

Writing Science Curriculum.

Brown University & Roger Williams Park Zoo, Zooscape Program. Providence, Rhode Island, Spring 1995.

Teacher self-assessment during literacy instructional planning.

National Reading Conference, San Diego, California, December 1994.

Integrating reading and writing in the content areas.

RI Department of Education Literacy Seminars, Providence, RI, Winter-Spring 1993, w / Dr. J. Barton, URI.

Making cultural connections with children's literature.

New England Reading Association, Portsmouth, NH, November 1992, w / Dr. J. Barton, URI.

Assessing comprehension monitoring.

International Reading Association Annual National Conference, Orlando, FL, May 1992, w / Dr. J. Barton, URI.

Productive talk in the classroom.

R.I. Chapter 1 Conference, Providence, RI, Spring 1992.

Critical thinking in the content area classroom.

Rhode Island Reading Association, November 1991, w / Dr. J. Barton, URI.

Instructional strategies for content area readers.

New England Reading Association, Hartford, CT, October 1991, w / Dr. J. Barton, URI.

Selected Teacher Inservice Workshops Conducted

Designing literacy portfolios. Hands-on workshop to design literacy portfolio assessment systems for grades 1-3, 4-6, and 7-12 teachers.

Strategic reading and writing instruction. Research and practice regarding cognitive strategies instruction for grades 1-4, 6-8, 9-12 teachers.

The research paper process. Instructional strategies for teaching all stages of the research paper for grades 4-12 teachers.

Exploring Latino Literature. Understanding Latino heritage and exploring instructional strategies for contemporary Latino literature for teachers in grades 5-12.

The writing process. Current research and practice associated with stages of the writing process, genre elements, and English language arts conventions for grades 1-6, and 7-12 teachers.

Writing assessment. Performance assessment techniques for assessing K-12 writing.

Reading in the content areas. Research and instructional methodology for pre, during, and post reading for grades 1-6, and 7-12 teachers.

Combining literacy and the scientific inquiry process. Instructional methodologies for teaching and reinforcing literacy strategies during science experimentation.

Writing integrated literature units. Instruction in how to link related literature together by theme for teachers in grades K-6.

Educational Research Conducted

Rome: Rome: Art and Culture through a Traveler's Eye. Action Research w/K. Mele , Rome, Italy, 2012.

Passport to Change: What did study abroad do for me? Roger Williams University, 2009-10.

Using Multicultural Literature to Teach Cultural Diversity and Tolerance in the Elementary School: Grades 2 and 4. 2006-07, Carey School, in Newport, Rhode Island.

Using Multicultural Literature to Teach Cultural Diversity and Tolerance in the Elementary School: Grades 2, 3, 5. 2005-06, Coggeshall and Underwood School in Newport, Rhode Island.

Convince Me! Teaching urban 8th graders the art of persuasive writing. Roger Williams University and Thompson Middle School, 2002-03. 2004-05.

The effects of a professional development middle school writing program on teachers' subsequent change in writing instruction. Roger Williams University and Warwick Public Schools, 2002.

Matching RI Beginning Teachers' Standards to pre-service teachers' portfolios. Roger Williams University, 1998-1999.

Pre-service teachers learn the principles of literacy performance assessment. Roger Williams University, 1997-1998.

A research-based model for developing a Secondary Education Program. Roger Williams University, 1996-1998.

Investigating English language arts writing strategies for bilingual children. Roger Williams University, 1996-1998.

The influence of teachers' systematic self-assessment on strategic reading instruction. (Doctoral dissertation) Boston University, 1995-1996.

Teacher self-assessment during literacy instructional planning. University of Rhode Island, 1992-93.

Literacy Evaluation Conducted

School level, grades PK-6 literacy evaluation of the Holland School, Sturbridge, Massachusetts school district, May 1997.

District level, grades PK-6 literacy evaluation of North Kingstown, Rhode Island school district, Spring 1994.

District level, grades K-12 literacy evaluation of Block Island, Rhode Island school district, Spring 1993 w / J. Barton, URI.

Selected Professional Committee Appointments

Rhode Island Association of Colleges for Teacher Education, 2010-present.

Association of Independent Colleges and Universities of Rhode Island, 2010-present

International Reading Association, Teacher Educator Awards Committee, 3-year tenure.

RI Literacy Education Leadership Council, Rhode Island Department of Education, 2009-10.

Reading First Subcommittee. Rhode Island Department of Education, 2003-2006

National Reading Conference, Field Council representative 1995 – 2006

National Reading Conference, Conference proposal referee, 2001-2010

RI Reading Policy reader. K-12, Rhode Island Department of Education, 2003-04

Project Performance. Rhode Island Department of Education, 1997-1999.

Professional Development Schools, Rhode Island Department of Education, 1996-98.

Roger Williams University Teacher Education Advisory Board, 1994-present.

Rhode Island Reading Association, Research and Studies Chair, 1996-97.

English Language Arts Frameworks. Rhode Island Department of Education, 1995-96.

English Language Arts Standards. Rhode Island Department of Education, 1995-96.

Teacher Education Accreditation Preparation

Roger Williams University, chair of extended visit program approval team, (all programs) 2013.

Roger Williams University, chair of interim visit program approval team, (all programs) 2011.

Roger Williams University MA in Literacy, chair of program approval team, 2010.

Roger Williams University MA in Literacy, chair of program approval team, 2006.

Roger Williams University MA in Literacy, chair of program approval team, 2004.

Roger Williams University Elementary Education, chair of program approval team, May 2001.

Roger Williams University Secondary Education Program, May 2000, w / E. LeBlanc and R. Audet.

Roger Williams University Secondary Education Preliminary Approval, May 1998, w / E. LeBlanc and R. Audet.

Roger Williams University Elementary Education Program, May 1996, w / E. LeBlanc.

University of Rhode Island Graduate Reading Program (NCATE), May, 1993, w / M. Hoyt as graduate assistants to J. Barton.

University Committee Appointment

Roger Williams University SED Dean's Search Committee, 2014.

Roger Williams University Core Curriculum Committee, 2013-present.

Roger Williams University Faculty-Led Study Abroad Advisory Committee, 2013.

Roger Williams University School of Education Secondary Ed Design Team, 2009.

Roger Williams University General Education Design Committee, 2008-10.

Roger Williams University Associate Provost Search Committee, 2008-09.

Roger Williams University Graduate Curriculum Committee, 2008-10.

Roger Williams University Committee for Teaching, Assessment, Advisement, 2006.

Roger Williams University Graduate Council, 2004-09.

Roger Williams University General Education Committee, 2008-09.

Roger Williams University School of Education, Dean's Search Committee, 2005-2006; 2006-07.

Roger Williams University School of Education, Dean's Search Committee Chair, 2004.

Roger Williams University Human Subjects Review Board, 2003-2006.

Roger Williams University Curriculum Committee, 2003-04.

Roger Williams University Sabbatical Committee, 2002-2005.

Roger Williams University Human Subjects Board Design Committee Chair, 2000-03.

Roger Williams University Academic Council, 2000-2002.

Roger Williams University Faculty Senate, elected 1997-1999.

Roger Williams University Faculty Senate, Univ Life Committee Chair, 1997-98.

Roger Williams University Dean's Diversity Council, 1994-1998.

University of Rhode Island Graduate Reading Program Curriculum Review, 1991-93.

University Service

Roger Williams University School of Education, Chairperson Middle-Secondary Program and MA Literacy, 2010-present.

Roger Williams University School of Education Representative to RIDE Partnership Committee, 2010-2013.

Roger Williams University School of Education Representative to Rhode Island Department of Education Certification Re-design Committee, 2012-13.

Roger Williams University Global and International Programs: Designed and implemented a study abroad program in Rome, Italy with Kate Mele. Program is on going, 2011-present.

Roger Williams University Global and International Programs Research Committee, co-chair with Assistant Provost, Guilan Wang, 2009-2010.

Roger Williams University English Thesis Program, second reader, 2004-12.

Roger Williams University 20/20 strategic plan for general education, 2007-08

Roger Williams University NEASC Task Force co-chair w/Dean Bob Potter, spring 2004-fall 2006.

Roger Williams University Global and International Programs: Designed and implemented a study abroad program in Siracusa, Sicily, 2005-2010.

Roger Williams University Interim Coordinator of the School of Education, spring 2004.

Roger Williams University Master's Programs Design Team. 2001-2002.

Roger Williams University Cooperating Teacher Seminar. Presenter of RWU Teacher Education Performance Assessment System, Winter, 1999.

Roger Williams University Portfolio Assessment Design Team chair, 1998-2000.

Roger Williams University Bridge to Success Program. Presenter representing the teaching career (for high school minority students), Fall 1997.

Roger Williams University Teacher Education Advisory Board. Member & presenter representing Teacher Education Department, Fall 1994-present.

Roger Williams University Open Houses for Prospective Students. Yearly presenter representing Teacher Education Department, Fall, 1994-present.

Roger Williams University Student Acceptance Days. Yearly presenter representing Teacher Education Department, Spring, 1995 – present.

Roger Williams University Freshman Orientation. Yearly advisor for incoming freshman, Summer, 1995 to present.

Selected Volunteer Literacy Activities

Gilbert Stuart School, Providence, RI. Teaching English language arts writing strategies to bilingual 4th grade students, 1996-1998 and 1992-93.

Boston University / Chelsea Partnership. Coaching "lead" Chelsea teachers to present at professional conferences, 1996-1998.

Boston University. Coaching doctoral students through writing the literature review and the discussion sections of their doctoral dissertations, 1996-1998.

Blithewold Museum, Bristol, RI. Teaching tour guides to motivate and engage children during museum tours, 1995.

Roger Williams Park Zoo Education Program, Providence, RI. Consulting with education personnel to write science curricula. 1992-1998.

Dorcas Place Literacy Center, Providence, RI Teaching literacy strategies to minority women, 1992-93.

Newport, RI. Conducting parent seminars on literacy instruction as requested by individual schools, 1998-1991.

RI Festival of Children & Books, sponsored by Women's and Infant's Hospital, Providence, RI. Assisting authors of children's books, 1988-91.

Awards and Honors

Roger Williams University Presidential Fellowship Award, "*Investigating Family Literacy*", 2004-05.

Mark Gould Student Learning Achievement Award (Teacher of the Year), Roger Williams University, 2004.

Exemplary science curricula award for the curriculum publication, *Dinosaurs! From the Regional Lab of Northeast and Environs*, 1993.

Appointed to the Boston University Chapter of Phi Delta Kappa Honor Society in May, 1991.

Life Teacher Certifications

Rhode Island Secondary English

Rhode Island Reading Specialist / Consultant, Prekindergarten – Adult

Rhode Island Teacher / Specialist, Prekindergarten – Adult

Rhode Island Adult Education

Professional Affiliations

Phi Delta Kappa Honor Society, inducted 1991.

National Reading Conference

Teacher's College Record On-line, yearly book reviewer, 2004-present

International Reading Association

Rhode Island Reading Association, past Research and Studies Chair

Victoria Tolbert-Bravo
153 Leah Street, Providence, RI 02908
401-919-9590
vstbravo@gmail.com

Education

Bridgewater State College, Bridgewater, MA

M.Ed. Elementary Education, May 2007 ▪ GPA – 3.9

University of Massachusetts/Boston, Boston, MA

M.Ed. Educational Administration, 2005 ▪ GPA – 3.8

University of Notre Dame, South Bend, IN

B.A., Sociology, 1994

Certifications

Rhode Island Building Level Administrator PK-12

Rhode Island Elementary Education Teacher, Grades 1-6

Rhode Island Middle Grade World Language Teacher, Grades 5-8 Elementary Extension, Spanish

Experience

2009-present **Paul Cuffee School**, Providence, RI

Dean of Students/Spanish Instructor & Department Chair

- Work with the school principal to establish and maintain a positive school environment with high academic and social expectations for students
- Coordinate and implements school wide behavior management system in conjunction with the administrative team
- Ensures that behavioral expectations and community standards are met
- Support and provide feedback for teachers regarding classroom management
- Arrange outside speakers for school-wide assemblies
- Train, supervise, and develop professional development plan for Teaching Partners
- Plan and coordinate annual College Day School Wide Field Trip
- Arrange academic showcases and special events
- Coordinate and run Saturday School Program
- Teach grades 6-8 in a culturally and academically diverse setting
- Design, plan, and implement thematic units of study
- Assess student performance and develop educational plans

- Write progress reports and end of term comments
- Build partnerships with parents
- Translate parent/teacher conferences

2007-2009 **Paul Cuffee School**, Providence, RI

Spanish Instructor

- Taught grades 4-8 in a culturally and academically diverse setting
- Designed, planned, and implemented thematic units of study
- Assessed student performance and developed their educational plans
- Wrote progress reports and end of term comments
- Translated parent/teacher conferences

2001 – 2007 **Gordon School**, East Providence, RI

Teacher

- Taught in a culturally and academically diverse fourth grade classroom
- Team taught in linguistically diverse Nursery classroom
- Designed, planned, and implemented comprehensive thematic units
- Assessed student performance and developed educational plans
- Wrote student progress reports and held parent conferences
- Wrote weekly parent newsletter
- Created a parent website

2000 – 2001 **Lincoln School, Infant Toddler Center**, Providence, RI

Director

- Managed child care center for 32 families
- Developed and managed annual operating budget
- Restructured program and cut operating costs by 2%
- Developed partnerships with community agencies
- Supervised teachers and help develop professional development plans
- Created parent newsletter

1998 – 2000 **Advantage Schools, Inc.**, Boston, MA

Grant Writer

- Wrote grants for charter schools
- Raised \$1.3M in grants

1996 – 1998 **Boston Parent Child Center**, Boston, MA

Director

- Managed Head Start Center for 100 families and 30 expectant women
- Developed and managed annual operating budget
- Ensured that center maintained its federal accreditation

- Ensured that the program met all state and federal regulations
- Developed community partnerships
- Supervised teachers and help develop professional development plans

1992 – 1996 **Department Health and Human Services, Head Start Bureau, Boston, MA**

Program Manager

- Managed Head Start Grantees
- Ensured grantees met local, state, and federal child care regulations
- Provided technical assistance to grantees
- Conducted on site program reviews of grantee program
- Presented workshops at regional conferences

Military Experience

- 2013-Present Rhode Island National Guard, First Lieutenant/Human Resources Officer
- 2010-2013 Rhode Island National Guard, Second Lieutenant/Communications Officer
- 1996-1999 Massachusetts National Guard
- 1993-1994 Indiana National Guard
- 1992-1993 Indiana Army Reserve

Community Involvement

- Past Member, Board of Directors, Buttonhole Golf Course, Providence, RI
- Past Member, Board of Directors, Youth Pride Inc. Providence, RI

Other Skills

- Bilingual – Spanish

Ida Lewis Leadership Academy Bylaws (Draft)

ARTICLE I — NAME AND PURPOSE

Section 1 — Name: The name of the organization shall be Ida Lewis Leadership Academy (henceforth known as *the School*). The School shall be a nonprofit organization and incorporated under the laws of the State of Rhode Island.

Section 2 — Purpose/Mission: Ida Lewis Leadership Academy, a vibrant and diverse K-8 public charter school, empowers its scholars to unlock their potential and unleash their greatness. In the spirit of Ida Lewis's life, we embrace the core values of compassion, courage, respect, and determination. Our rigorous, 21st Century curriculum, integrated with technology and experiential learning, fosters creativity, critical thinking, and collaboration. We are committed to educating the whole child and inspiring our scholars to be culturally competent and environmentally conscious leaders who make a difference in the world.

ARTICLE II — MEMBERSHIP

Section 1 — Eligibility for membership: Application for voting membership shall be open to any current parent of a student, an employee of a RI community base organization, for profit or nonprofit or a RI university or college educator that supports the purpose statement in Article I.

Section 2 — Membership is granted after completion and receipt of a membership application. All memberships shall be granted upon a majority vote of the board.

Section 3 — Annual dues: there are no dues for membership.

Section 4 — Rights of members: Each member shall be eligible to appoint one voting representative to cast the member's vote in board elections.

Section 5 — Resignation and termination: Any member may resign by filing a written resignation with the secretary. A member can have their membership terminated by a majority vote of the membership.

Section 6 — Non-voting membership: The board shall have the authority to establish and define non-voting categories of membership.

ARTICLE III — MEETINGS OF MEMBERS

Section 1 — Regular meetings: Regular meetings of the members shall be held a minimum of 4 times annually.

Section 2 — Annual meetings: Annual meeting of the members shall take place in the month of August, the specific date, time and location of which will be designated by the Chairperson. At the annual meeting the members shall elect directors and officers, receive reports on the activities of the association, and determine the direction of the association for the coming year.

Section 3 — Special meetings: Special meetings may be called by the chair, or a simple majority of the board of directors. A petition signed by seventy five percent of voting members may also call a special meeting.

Section 4 — Notice of meetings: Printed notice of each meeting shall be given to each voting member, by mail or email, not less than five days prior to the meeting.

Section 5 — Quorum: A quorum must be attended by at least fifty percent of board members for business transactions to take place and motions to pass.

Section 6 — Voting: All issues to be voted on shall be decided by a simple majority of those present at the meeting in which the vote takes place.

ARTICLE IV — BOARD OF DIRECTORS

Section 1 — Board role, size, and compensation: The board is responsible for overall policy and direction of the association, and delegate responsibility of day-to-day operations to the staff and committees. The board shall have eleven members. The board receives no compensation other than reasonable expenses.

Section 2 — Terms: All board members shall serve two-year terms, but are eligible for re-election for up to five consecutive terms as long as they remain an eligible member.

Section 3 — Meetings and notice: The board shall meet at least four times annually, at an agreed upon time and place. An official board meeting requires that each board member have written notice at least five days in advance.

Section 4 — Board elections: New directors and current directors shall be elected or reelected by the voting representatives of members at the annual meeting. Directors will be elected by a simple majority of members present at the annual meeting.

Section 5 — Election procedures: A Membership Committee shall be responsible for nominating a slate of prospective board members representing the association's diverse constituency. In addition, any member can nominate a candidate to the slate of nominees.

Section 6 — Quorum: A quorum must be attended by at least fifty percent of board members for business transactions to take place and motions to pass.

Section 7 — Officers and Duties: There shall be four officers of the board, consisting of a president, vice-president, secretary and treasurer. Their duties are as follows: *The president* shall convene regularly scheduled board meetings, shall preside or arrange for other members of the board to preside at each meeting in the following order: vice-chair, secretary, treasurer. *The vice-president* shall chair committees on special subjects as designated by the board. *The secretary* shall be responsible for keeping records of board actions, including overseeing the taking of minutes at all board meetings, sending out meeting announcements, distributing copies of minutes and the agenda to each board member, and assuring that corporate records are maintained. *The treasurer* shall make a report at each board meeting. The treasurer shall chair the finance committee, assist in the preparation of the budget, help develop fundraising plans, and make financial information available to board members and the public.

Section 8 — Vacancies: When a vacancy on the board exists mid-term, the secretary must receive nominations for new members from present board members two weeks in advance of a board meeting. These nominations shall be sent out to board members with the regular board meeting announcement, to be voted upon at the next board meeting. These vacancies will be filled only to the end of the particular board member's term.

Section 9 — Resignation, termination, and absences: Resignation from the board must be in writing and received by the Secretary. A board member shall be terminated from the board due to excess absences, more than two unexcused absences from board meetings in a year. A board member may be removed for other reasons by a three-fourths vote of the remaining directors.

Section 11 — Special meetings: Special meetings of the board shall be called upon the request of the chair, or one-third of the board. Notices of special meetings shall be sent out by the secretary to each board member at least two weeks in advance.

ARTICLE V — COMMITTEES

Section 1 — Committee formation: The board may create committees as needed, such as fundraising, housing, public relations, data collection, etc. The board chair appoints all committee chairs.

Section 2 — Finance Committee: The treasurer is the chair of the Finance Committee, which includes three other board members. The Finance Committee is responsible for developing and reviewing fiscal procedures, fundraising plans, and the annual budget with staff and other board members. The board must approve the budget and all expenditures must be within budget. Any major change in the budget must be approved by the board. The fiscal year shall be the calendar year. Annual reports are required to be submitted to the board showing income, expenditures, and pending income. The

Section 3 – Continuous School Improvement Committee (CSI): the purpose of this committee is to ensure oversight and continuous improvement of the school's curriculum and assessment systems.

Section 4 - Discipline Sub-committee of the Board: This committee is charged with handling discipline matters when there is dissatisfaction with school administration's disposition of a case. The school's board, in acting as the district's school committee, must be the body to make and pass recommendations for student exclusions. Members of this committee are board members.

ARTICLE VI — DIRECTOR AND STAFF

Section 1 — Executive Director: The Executive Director is hired by the board. The Executive Director has day-to-day responsibilities for the organization, including carrying out the organization's mission, goals and policies. The Executive Director will attend all board meetings, report on the progress of the organization, answer questions of the board members and carry out the duties described in the job description. The board can designate additional duties as necessary.

ARTICLE VII — AMENDMENTS

Section 1 — Amendments: These bylaws may be amended when necessary by two-thirds majority of the board of directors. Proposed amendments must be submitted to the Secretary to be sent out with regular board announcements.

CERTIFICATION

These bylaws were approved at a meeting of the board of directors by a two thirds majority vote on TBD.

**Ida Lewis Leadership Academy
Executive Director
Job Description**

Qualifications: The Executive Director of the Ida Lewis Leadership Academy will ensure fulfillment and attainment of the Academy's Mission Statement. The Executive Director will possess exceptionally strong and successful instructional and administrative experience, a passion for academic excellence, a dedication to student-centered education and leadership, a commitment to teamwork and collaboration, and excellent communication skills. The Executive Director will be expected to champion high academic standards, establish a positive and visible presence in the school community, develop respectful and trusting professional relationships, represent the school as a thoughtful and articulate spokesperson, and develop and maintain an exceptionally positive school culture and attitude to support students, faculty, parents and our community partners.

Qualifications:

1. A proven record of success leading learning communities.
2. Certification as a Building Administrator
3. Entrepreneurial spirit
4. Unwavering belief in the limitless potential within each child
5. Other qualifications as determined by the Board

Reports to: The Ida Lewis Leadership Academy Board of Directors

Performance Responsibilities: *Highlights denote work to be completed by 8/2015

The Executive Director of Ida Lewis Leadership Academy must demonstrate mastery in the following key areas:

ACADEMIC ACHIEVEMENT

The Executive Director of Ida Lewis Leadership Academy will promote student learning through implementation of a clear mission and vision and high expectations for every student. She will provide a research-based curriculum, effective instructional methods, and allocate resources effectively. The Executive Director will develop clear, measurable program standards and school academic objectives, as well as meet stated performance standards, provide support for differentiating instruction to meet the needs of all learners and increase student achievement.

By:

- Developing clear, rigorous, measurable program standards and student learning objectives.
- Developing, articulating, and coordinating research-based curriculum and clearly defined expectations for student learning, including essential and enduring knowledge and skills that are consistent with the school's purpose and charter.

- Supporting instruction that is research-based and reflective of best practices.
- Allocating appropriate resources in the way of scheduling, curricular materials, instructional services, staff, staff development, and facilities to promote high levels of student achievement.
- Implementing a comprehensive assessment system that monitors and documents performance and uses these results to improve student achievement and school effectiveness.
- Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: Charter performance objectives, Standardized Test Scores, AYP Status, Curriculum Support Documents (e.g., curriculum maps, etc.), School-based formative and summative assessments.

GOVERNANCE AND SCHOOL LEADERSHIP

The Executive Director of Ida Lewis Leadership Academy will be governed and led by a competent individual who is a responsible steward of the charter's mission and vision and of public funds and trust. The Executive Director, working with the Governing Board, will carry out all duties in a professional, responsible, and ethical manner and use their influence and authority for the primary purpose of achieving student success.

By:

- Effectively communicating and engaging stakeholders in the mission and vision of the school.
- Developing policies and practices that clarify the responsibilities and relationships among the Governing Board members, key leaders, staff, students, and parents.
- Conducting regular Board meetings that address critical issues and responsibilities related to school governance such as academic achievement, fiscal health, and policy
- Creating and communicating sound and comprehensive policies related to critical matters such as governance, human resources, fiscal management, operations, discipline, safety, and facility.
- Engaging in regular professional development, reflective practices, development, and self-assessment his (her) performance.
- Building capacity through reading professional literature applicable to governance of a public charter school, attending trainings, conferences, or seminars
- Developing and implementing a systematic procedure for communicating expectations of the school staff, including performance monitoring, professional development, and assessment.
- Facilitating leadership development opportunities for all Academy staff consistent with established expectations and levels of competency and performance

- Engaging Academy staff in regular collaborative meetings to address critical issues and responsibilities related to school administration such as pedagogical practices, student growth and achievement, and school procedures.
- Creating clear procedures following school policy related to critical matters such as human resources, financial accounting, operations, discipline, instruction, safety, and facility.
- Providing a systematic analysis and review of student performance and school effectiveness and provides direction, assistance, and resources to align, support, and enhance all parts of the school in meeting organizational and student performance goals.
- Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: Board minutes, Staff Meeting minutes or Other Documentation, School Leader Monitoring and Evaluation Summary.

FISCAL RESPONSIBILITY

The Executive Director of Ida Lewis Leadership Academy will fulfill her fiduciary responsibility for public funds and maintain transparent fiscal practices and records according to non-profit, state, and local regulatory and reporting requirements.

By:

- Monitoring immediate and long-range financial plans to effectively implement the school's educational program and ensure financial stability.
- Conducting comprehensive budget processes including developing a year-long budget planning timeline, a projection of revenue calculations, projection of expenditures, and as annual review of the status of significant operating costs, including employee salaries, benefits, facility, etc.
- Regularly preparing financial reports and presenting them to the Governing Board for oversight and use in short range and long range financial planning.
- Regularly reviewing and carefully monitoring budget reports, balance sheets, cash flow statements, income and expense statements.
- Verifying that accounts payable obligations are up-to-date, appropriately described, and disclosed in financial statements.
- Verifying that an annual audit is conducted by an independent certified public accountant (CPA) and is performed in accordance with generally accepted auditing standards to ensure that the school's finances are being managed in accordance with generally accepted accounting principles and practices.
- Ensuring that the school engages the expertise of a certified Financial Officer who has the required credentials and experience.
- Ensuring that the school remains fiscally sustainable.
- Ensuring that enrollment levels are maintained or show controlled growth in accordance with our Charter.
- Ensuring that staff, leadership, and board retention is maintained at a stable level indicative of a positive school culture and effective governance and management.

Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: Annual audit and management letter, Summary of process utilized for reviewing financials (type of reports, frequency), summary of budget process and timeline, enrollment trends, staff, leadership, and board retention rates.

OPERATIONS, RESOURCES, AND SUPPORT SYSTEMS

The Executive Director of Ida Lewis Leadership Academy will operate effectively and efficiently through the appropriate use of resources. He (she) will engage in a process of continuous self-improvement in order to increase the effectiveness of the Academy's educational program and ability to meet its mission and charter performance objectives.

By:

- Creating, monitoring, and enforcing sound and comprehensive policies and procedures.
- Developing, maintaining, reviewing, and modifying, as needed, policy manuals including core areas such as human resources, financial, instruction, and plant operations and making these available to all stakeholders.
- Developing, maintaining, reviewing, and modifying, as needed, procedural manuals such as employee handbooks and parent or student handbooks and making these available to the appropriate parties.
- Ensuring that the Academy establishes and implements processes to recruit, employ, retain, and mentor qualified professional and support staff to fulfill assigned roles and responsibilities.
- Ensuring that the Academy establishes and implements a process to assign professional and support staff based on school needs and staff qualifications as may be required by federal and state law and regulation (e.g., professional preparation, certification, ability, knowledge, and experience).
- Ensuring that qualified staff is sufficient in number to meet the vision and purpose of the school and to meet federal and state law and regulations, if applicable.
- Ensuring the establishment and implementation of a process to design, evaluate, and improve professional development, and ensures participation by all faculty and staff.
- Developing and implementing processes and plans for maintaining and improving sites, facilities, and equipment.
- Providing technology infrastructure and equipment that is sufficient to accomplish the school's goals.
- Providing and coordinating support services that meet the health, counseling, nutrition, and transportation needs of all students and complies with all federal and state safety and insurance requirements.
- Providing counseling services that sufficiently addresses mental, social, and behavioral needs of students.

- Developing and implementing a system that regularly monitors and evaluates the success of the school's programs and services, success against performance objectives, and stakeholder satisfaction.
- Collecting achievement data and utilizing the data for school improvement planning.
- Seeking input from stakeholders (e.g., surveys, focus groups, etc.) in monitoring and evaluating the school's performance against performance objectives.
- Participating in preparation of the annual report, creating a yearly School Improvement Plan and a yearly Staff Development Plan.
- Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: Policy manual, Procedural handbook, School Improvement Plan, Staff Development Plan, Technology summary/plan, Transportation Plan and Food Service Plan (including vendors, methods, insurance, etc.)

LEGAL & REGULATORY REQUIREMENTS

The Executive Director of Ida Lewis Leadership Academy will ensure that the Academy operates following all federal, state, and local legal and regulatory requirements.

By:

- Ensuring that policies adopted by the Academy are reviewed by legal counsel to ensure compliance with all federal, state, and local legal and regulatory requirements.
- Demonstrating their cogent understanding of the laws that govern charter schools and monitoring the trends, issues, and potential changes in the environment in which charter schools operate.
- Ensuring that the Academy is in compliance with all charter contract requirements, all federal, state, and local laws, regulations, standards, and mandates and all IRS non-profit regulations.
- Ensuring that the Academy maintains access to legal counsel to advise or obtain information about legal requirements and obligations.
- Ensuring that the Academy has clearly defined grievance and conflict resolution procedures for students, parents, and staff that are communicated to all stakeholders.
- Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: By-Laws, Conflict of Interest Policy, Name of legal counsel and contact information, Grievance and Conflict Resolution Policy.

SAFETY AND RISK MANAGEMENT

The Executive Director of Ida Lewis Leadership Academy will assure the safety of all staff, students, parents, and visitors and proactively manage risk to the organization.

By:

- Maintaining adequate insurance or equivalent resources to protect the Academy's financial stability and administrative operations.

- Ensuring the safety of the students and protection of school assets by employing criminal background checks on board members, staff members, contractors, and volunteers or chaperones working directly with students.
- Utilizing a safety committee to oversee and report safety concerns to the administration.
- Maintaining sites, facilities, services, and equipment to provide a safe, orderly, and healthy environment.
- Establishing and implementing written security and crisis management plans with appropriate training for all stakeholders.
- Maintaining Certificates of Insurance on all contractors or vendors.
- Implementing and enforcing policies that reduce hazards and risks to the school; related to personnel and employment practices; related to school security, building access, etc.; related to transportation, field trips, and special activities; related to harassment, abuse, and drug and alcohol matters.
- Developing and implementing a comprehensive student discipline policy (including due process procedures for suspension and expulsion) that maximizes safety and learning time.
- Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: School security summary (reference any policies, systems, or specific practices), Crisis Management Plan, Summary of insurance coverage and amounts, Narrative of criminal background check practices, Student Discipline Policy and due process procedures

CULTURE, COMMUNITY, AND RELATIONSHIP BUILDING

The Executive Director of Ida Lewis Leadership Academy will foster effective communication and relationships with and among its stakeholders and ensure the establishment of shared accountability for student achievement.

By:

- Fostering collaboration with and soliciting the knowledge and skills of community businesses, civic groups, educational entities, and stakeholders to support student learning.
- Employing strategies to listen to and communicate timely and meaningful information to all stakeholders.
- Communicating the expectations for student learning and goals for improvement to all stakeholders.
- Creating and supporting collaborative networks of stakeholders to support the school's programs.
- Providing opportunities such as committees, focus groups, surveys, etc. for stakeholders to participate in the decision-making process.
- Generating and sustaining a school culture reflective of the charter's mission and vision that is conducive to student learning and staff professional growth.
- Utilizing evidence to assess progress toward meeting the above objectives, including but not limited to: Narrative of community involvement and

partnerships, Narrative of parent communication vehicles, Narrative of collaborative efforts with partners, Narrative of specific practices related to building culture, Satisfaction surveys from parents, staff, and students.

EDUCATIONAL CONSULTANT

Job Description

Qualifications: A Consultant to the Ida Lewis Leadership Academy must embody the mission of the Ida Lewis Leadership Academy to provide the academic support needed to enhance students' learning opportunities. He (she) must possess expertise in curriculum, instruction, and assessment, professional development delivery, data collection and analysis, funding sources and compliance, program implementation, a commitment to teamwork and collaboration, excellent communication skills, forward thinking, and understand the importance of authentic incorporation of technology into the instructional program.

Qualifications:

- 1) A proven record of success supporting learning communities.
- 2) Certification in Curriculum and Instruction
- 3) Strong Interpersonal skills
- 4) Unwavering belief in the limitless potential within each child
- 3) Other qualifications as determined by the Academic Leader

Reports to: The Ida Lewis Leadership Academy Executive Director

Performance Responsibilities: Provide consultative work in providing assistance to teachers, faculty, curriculum supervisors, education/departmental administrators, local education agencies, and educational programs/projects in the development, implementation, and evaluation of education programs/projects. Assist in the design and implementation of instructional strategies based on current instruction methodologies; develop, evaluate and advise on the use of curriculum/instructional materials; develop the measures and methods of evaluating the effectiveness of the educational programs and subsequent assessment of strategy effectiveness. Work may also include relating evaluation processes to specific educational placement, and planning the overall diagnostic program in the organization. Consultant may be assigned to specifically support subject matter areas such as English, Mathematics, or Science or to education support programs, which cross curriculum lines and impact on the instructional process in all areas.

An Educational Consultant will be engaged when their expertise is needed to augment the skill-set of leadership in the following:

- Writing, reviewing, and revising curriculum and assessments.
- Aligning curriculum, instruction, and assessments horizontally and vertically with our schools mission, the Common Core and Next Generation Science Standards
- Collaborating with teachers, support professionals, and instructional leaders to ensure that curriculum and assessments are rigorous, implemented with fidelity, and that instructional practices within classrooms are effective.
- Creating and implementing formal professional development sessions on best practices in curriculum, assessment, and instruction.

- Conducting and participating in conferences, workshops, and public meetings with school board members, leadership, teachers, and citizen groups on various school issues.
- Advising on instructional and curriculum problems, educator accountability, grant program requirements, and/or other school program areas.
- Functions as liaison with school districts throughout Newport County.

PREFERRED QUALIFICATIONS: We are seeking leaders with the following competencies:
Consultation/Advising

- Ability to provide advice and counsel.
- Ability to understand programs, organization and culture.
- Ability to exercise excellent judgment in decision-making

Knowledge-

- Professional Knowledge of and professional skills in specific area(s) and keeps current with developments and trends in areas(s) of expertise.
- Knowledge of national, state, and local educational goals and objectives
- Knowledge of learning theory and curriculum development along with current educational trends, methods, research, and technology
- Knowledge of reporting methods related to the work, grant funding and budgeting processes, and recent developments and current literature in the field of education

Analytical Thinking and Research

- Ability to identify issues and obtain relevant information.
- Ability to relate and compare data from different sources, and identify alternative solutions.
- Ability to review and study relevant information from various sources.

Communication

- Ability to communicate information to individuals or groups; and deliver presentations suited to the characteristics and needs of the audience.
- Ability to clearly and concisely convey information orally or in writing to individuals or groups to ensure that they understand the information and the message.
- Ability to listen and respond appropriately to others.

Training and Professional Development

- Ability to facilitate various size working groups working collaboratively
- Ability to supervise, coach, and guide others to develop new skills or knowledge that will enhance their work.
- Ability to design, develop and/or deliver training program

URBAN LEAGUE OF RHODE ISLAND, INC.

FINANCIAL STATEMENTS AND
SUPPLEMENTARY INFORMATION
YEARS ENDED JUNE 30, 2012 AND 2011
WITH REPORT OF INDEPENDENT AUDITORS

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REPORT OF INDEPENDENT AUDITORS

Board of Directors
Urban League of Rhode Island, Inc.
Providence, Rhode Island

We have audited the accompanying statements of financial position of the Urban League of Rhode Island, Inc. (a non-profit Corporation) as of June 30, 2012 and 2011 and the related statements of activities, changes in net assets, and cash flows for the years then ended. These financial statements are the responsibility of the Organization's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

In our opinion, the financial statements referred to previously present fairly, in all material respects, the financial position of the Urban League of Rhode Island, Inc. as of June 30, 2012 and 2011, and the changes in its net assets and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

In accordance with *Government Auditing Standards*, we have also issued our report dated April 15, 2013 on our consideration of Urban League of Rhode Island, Inc.'s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* and should be considered in assessing the results of our audit.



Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The Schedule of Functional Expenses on Pages 16 - 19 and Schedule of Expenses for Rhode Island Families for Children on Page 20 are presented for purposes of additional analysis and are not a required part of the financial statements. In addition, the accompanying schedule of expenditures of federal awards, as required by U.S. Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*, is presented for purposes of additional analysis and is also not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the Schedule of Functional Expenses, Schedule of Expenses for Rhode Island Families for Children, and schedule of expenditures of federal awards is fairly stated in all material respects in relation to the financial statements as a whole.

A handwritten signature in black ink that reads "Braver PC". The signature is written in a cursive, flowing style.

Providence, Rhode Island
April 15, 2013

URBAN LEAGUE OF RHODE ISLAND, INC.

STATEMENTS OF FINANCIAL POSITION

June 30, 2012 and 2011

	<u>ASSETS</u>	
	<u>2012</u>	<u>2011</u>
Current assets:		
Cash and cash equivalents	\$ 170,235	\$ 70,813
Grants receivable	375,794	449,582
Accounts receivable	28,461	121,729
Rents and utilities receivable	25,799	3,333
Prepaid expenses	2,773	15,611
Total current assets	<u>603,062</u>	<u>661,068</u>
Land, building and equipment, net	<u>3,995,281</u>	<u>4,147,908</u>
TOTAL ASSETS	<u>\$ 4,598,343</u>	<u>\$ 4,808,976</u>
 <u>LIABILITIES AND NET ASSETS</u>		
Current liabilities:		
Note payable	\$ 339,000	\$ 314,000
Accounts payable	171,366	81,774
Accrued payroll and related expenses	184,632	222,417
Accrued expenses-other	27,500	25,500
Advances on grants	139,332	208,674
Custodial accounts	17,267	7,117
Current portion of long-term debt	8,592	17,220
Total current liabilities	<u>887,689</u>	<u>876,702</u>
Long-term debt	<u>391,594</u>	<u>401,440</u>
Total liabilities	<u>1,279,283</u>	<u>1,278,142</u>
Net assets:		
Unrestricted	3,114,432	3,475,339
Temporarily restricted	159,628	10,495
Permanently restricted	45,000	45,000
Total net assets	<u>3,319,060</u>	<u>3,530,834</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 4,598,343</u>	<u>\$ 4,808,976</u>

SEE NOTES TO THE FINANCIAL STATEMENTS.

URBAN LEAGUE OF RHODE ISLAND, INC.STATEMENTS OF ACTIVITIES
YEARS ENDED JUNE 30, 2012 AND 2011

	<u>2012</u>	<u>2011</u>
Changes in unrestricted net assets:		
Public support and revenue:		
Support from governmental agencies	\$ 2,686,170	\$ 2,751,038
Contributions and grants	37,757	490,979
Program fees	65,697	129,602
Membership income	2,117	3,189
Interest income	8	10
Neighborhood facility rents	216,846	274,542
Administrative fees	11,663	47,582
Fundraising	46,721	66,896
Miscellaneous income	12,357	51,346
Total unrestricted public support and revenue	3,079,336	3,815,184
Net assets released from restrictions:		
Satisfied by use of funds for scholarships and building improvements	39,623	18,850
Total unrestricted public support, revenue and other	3,118,959	3,834,034
Expenses:		
Program services:		
Case Management	117,021	171,006
Advocacy and Public Policy	79,756	89,443
Youth Program	676,548	613,232
Alternative Schools	76,155	56,855
Education and Training	404,076	105,165
Community Health Services	238,760	457,778
Shelters	278,062	355,002
Rhode Island Families for Children	143,235	142,242
Safe Haven	454,408	516,757
After School Care	294,457	348,535
Scholarships	15,873	18,630
Supporting services:		
Neighborhood services	301,985	290,239
Management and general	368,902	404,132
Young Professionals	24,362	21,276
Urban League Guild	6,266	4,672
Total expenses	3,479,866	3,591,964
Increase (decrease) in unrestricted net assets	(360,907)	242,070
Temporarily restricted net assets:		
Contributions restricted for scholarships	3,206	19,709
Champlin grant funds	185,550	-
Net assets released from restriction	(39,623)	(18,850)
Increase in temporarily restricted net assets	149,133	859
Increase (decrease) in net assets	\$ (211,774)	\$ 242,929

SEE NOTES TO THE FINANCIAL STATEMENTS.

URBAN LEAGUE OF RHODE ISLAND, INC.STATEMENTS OF CHANGES IN NET ASSETS
YEARS ENDED JUNE 30, 2012 AND 2011

	<u>2012</u>	<u>2011</u>
<i>Unrestricted net assets:</i>		
Beginning of year	\$ 3,475,339	\$ 3,233,269
Increase (decrease) in unrestricted net assets	(360,907)	242,070
<i>Balance at end of year</i>	<u>\$ 3,114,432</u>	<u>\$ 3,475,339</u>
<i>Temporarily restricted net assets:</i>		
Beginning of year	\$ 10,495	\$ 9,636
Increase in temporarily restricted net assets	149,133	859
<i>Balance at end of year</i>	<u>\$ 159,628</u>	<u>\$ 10,495</u>
<i>Permanently restricted net assets:</i>		
Beginning of year	\$ 45,000	\$ 45,000
<i>Balance at end of year</i>	<u>\$ 45,000</u>	<u>\$ 45,000</u>

SEE NOTES TO THE FINANCIAL STATEMENTS.

URBAN LEAGUE OF RHODE ISLAND, INC.STATEMENTS OF CASH FLOWS
YEARS ENDED JUNE 30, 2012 AND 2011

	<u>2012</u>	<u>2011</u>
<i>Cash flow from operating activities:</i>		
Change in net assets	\$ (211,774)	\$ 242,929
Adjustments to reconcile net income to net cash provided by operating activities:		
Depreciation	178,549	199,568
(Increase) decrease in:		
Grants and accounts receivable	167,056	(96,010)
Rents and utilities receivable	(22,466)	(3,333)
Prepaid expenses	12,838	(12,844)
Increase (decrease) in:		
Accounts payable	89,592	46,275
Accrued expenses	(35,785)	(115,729)
Advances on grants	(69,342)	(48,034)
Custodial accounts	10,150	(7,700)
<i>Net cash provided by operating activities</i>	<u>118,818</u>	<u>205,122</u>
<i>Cash flow from investing activities:</i>		
Acquisition of property and equipment	<u>(25,922)</u>	<u>(432,798)</u>
<i>Net cash used by investing activities</i>	<u>(25,922)</u>	<u>(432,798)</u>
<i>Cash flow from financing activities:</i>		
Net increase in note payable	25,000	185,000
Repayment of long-term debt	<u>(18,474)</u>	<u>(14,587)</u>
<i>Net cash provided by financing activities</i>	<u>6,526</u>	<u>170,413</u>
Net Increase (decrease) in cash and cash equivalents	99,422	(57,263)
Cash and cash equivalents, beginning of year	<u>70,813</u>	<u>128,076</u>
Cash and cash equivalents, end of year	<u>\$ 170,235</u>	<u>\$ 70,813</u>

Interest:

Cash paid for interest for fiscal years ended June 30, 2012 and 2011 was \$19,365 and \$23,520, respectively.

SEE NOTES TO THE FINANCIAL STATEMENTS.

URBAN LEAGUE OF RHODE ISLAND, INC.

NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011

1. SIGNIFICANT ACCOUNTING POLICIES

Organization

The Urban League of Rhode Island, Inc. is a nonprofit organization located in the City of Providence, Rhode Island and an established affiliate of the National Urban League, Inc. The Organization's purpose is to assist in developing solutions to improve conditions in problem-ridden communities affected by racial inequalities. By finding and creating opportunities for employment and training, housing, education and health and welfare, the Organization hopes to realize its mission.

The Organization entered into agreements with South Providence Development Corporation (a non-profit organization) and Cleanscape, Inc. (a for profit corporation). These entities have not been included in the financial statements of the Urban League of Rhode Island, Inc. as they do not meet the economic interest test under generally accepted accounting principles.

Basis of Accounting

The accompanying financial statements are presented using the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America (GAAP).

Cash and Cash Equivalents

For financial statement purposes, the Organization considers all highly liquid debt instruments purchased with an original maturity of three months or less to be cash equivalents.

Property and Equipment

Property and equipment is stated at cost, or fair value at date of donation, if donated. Property under capital lease obligations is recorded at the lower of the present value of future minimum lease payments or the fair value of the property at the beginning of the lease term. The cost and accumulated depreciation of assets sold or retired are removed for the respective amounts and any gain or loss is recorded in earnings. Maintenance and repairs are charged to expense when incurred. The Organization's policy is to capitalize costs that increase the value of property and equipment, prolong its life, or adapt it to a new and different use. Depreciation is provided on the straight-line basis over the estimated useful lives of the assets as follows:

<u>Assets</u>	<u>Life</u>
Buildings and improvements.....	5 - 30 years
Furniture.....	1 - 15 years
Transportation equipment.....	5 years

Depreciation expense for the years ended June 30, 2012 and 2011 was \$178,549 and \$199,568, respectively.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.

NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011

1. **SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)**

Program Services

The principal programs run by the Organization are as follows:

*** Case Management**

The Case Management Unit provides a wide range of services to low income and below poverty level individuals who are facing crisis in meeting their basic needs.

*** Advocacy and Public Policy**

Advocacy, Public Policy (APP) works directly with community members to support organizing around policy issues critical to community members, such as improving neighborhoods.

*** Youth Program**

The Youth Program provides a wide range of services to teen mothers.

*** Alternative School**

The Bridge School provides academic enrichment and educational training to students of the Providence School System who may be suspended.

*** Education and Training Unit**

The Education and Training Unit opens doors for many, providing education and job placement opportunities.

*** Community Health Services**

Community Health Services includes HIV Education program that provides educational services on HIV prevention, and Fresh Start program which is a discharge planning program to serve offenders who are identified as high risk for re-offending upon release.

*** Emergency Shelters**

The Urban League's two emergency shelters, Operation First Step (Women's Shelter) and the Prairie Avenue (Men's Shelter), provide short-term transitional housing as well as meals and support services for families and homeless individuals.

*** Rhode Island Families for Children**

Rhode Island Families for Children combines many initiatives in providing homes for children in need of loving and secure families. The program recruits, provides information, advocacy, referrals and support to families in adoption, foster care and host homes.

*** The Safe Haven Program**

Safe Haven is a supervised, transitional residential care and supportive service program for people who are both homeless and mentally ill.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 20111. **SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)****Program Services (CONTINUED)***** After School Care**

This program provides before and after school care for kids.

Contributions

In accordance with GAAP, contributions received are recorded as unrestricted, temporarily restricted, or permanently restricted support depending on the existence and/or nature of any donor restrictions. Under GAAP, such contributions are required to be reported as temporarily restricted support and are then reclassified to unrestricted net assets upon expiration of the restriction.

Net Assets

Under GAAP, the Organization is required to report information regarding its financial position and activities according to three classes of assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

Permanently Restricted

The Organization reports gifts of cash and other assets as permanently restricted if they are received with donor stipulations that they be held indefinitely.

Temporarily Restricted

The Organization reports gifts of cash, grants and other assets as restricted support if they are received with donor stipulations that limit the use of the donated asset. When a donor restriction expires or the purpose of the restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions.

Unrestricted

The Organization reports gifts of land, buildings, equipment, and other assets as unrestricted unless explicit donor stipulations specify how the donated assets must be used.

Estimates

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosures of contingent assets and liabilities at the date of the financial statements and the reported amount of revenues and expenses during the reporting period. Actual results could differ from those estimates.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.

NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011

1. **SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)**

Fair Value Measurements

GAAP establishes a framework for measuring fair value and expands required disclosure about fair value measurements of certain assets and liabilities.

Fair value is defined as the exchange price that would be received to sell an asset or paid to transfer a liability (an exit price) in the principal or most advantageous market for the asset or liability in an orderly transaction between market participants on the measurement date. The framework establishes a fair value hierarchy which requires an entity to maximize the use of observable inputs and minimize the use of unobservable inputs when measuring fair value. The framework describes three levels of inputs that may be used to measure fair value:

Basis of Fair Value Measurement

Level 1: Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the Organization has the ability to access.

Level 2: Inputs to the valuation methodology include:

- Quoted prices for similar assets or liabilities in active markets;
- Quoted prices for identical or similar assets or liabilities in inactive markets;
- Inputs other than quoted prices that are observable for the asset or liability;
- Inputs that are derived principally from or corroborated by observable market data by correlation or other means.

If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

Level 3: Inputs to the valuation methodology are unobservable and significant to the fair value measurements.

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Income Taxes

The Organization is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. The Organization is also exempt from Rhode Island income taxes. However, income from certain activities not directly related to the Organization's tax-exempt purpose may be subject to taxation as unrelated business income at both the state and federal levels.

The Organization evaluates all significant tax positions as required by GAAP. As of June 30, 2012 the Organization does not believe that it has taken any tax positions that would require the recording of any additional tax liability nor does it believe that there are any unrealized tax benefits that would either increase or decrease within the next twelve months. The Organization's income tax returns are subject to examination by the appropriate taxing jurisdictions. As of June 30, 2012 the Organization's federal and state tax returns generally remain open for the last three years.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011**1. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)****Concentration of Revenue**

A significant amount of support of the Organization is through contract funding with government agencies.

Advertising Costs

It is the Organization's policy to expense advertising costs as incurred. Advertising expense for fiscal years ended June 30, 2012 and 2011 was \$12,494 and \$16,916, respectively.

Subsequent Events

Subsequent events have been evaluated through April 15, 2013, which is the date the financial statements were available for issuance. Management does not believe there have been any events which have occurred that require adjustment to the financial information as presented, or further disclosure.

2. CASH DEPOSITS

At June 30, 2012, the carrying amount of cash deposits was \$170,235 while the bank balance was \$276,161 all of which was covered by federal depository insurance.

At June 30, 2011, the carrying amount of cash deposits was \$70,813 while the bank balance was \$169,862 all of which was covered by federal depository insurance.

3. GRANTS AND ACCOUNTS RECEIVABLE

Grants receivable at June 30, 2012 and 2011 consisted of the following:

	<u>2012</u>	<u>2011</u>
RI Department of Children and Families.....	\$ -	\$ 12,738
RI Department of Health and Human Services	33,412	45,000
Providence School Department	107,133	20,763
The Doric Center (CCAP).....	79,743	84,413
RI Department of Health	18,080	36,227
RI Housing and Mortgage Finance Corporation	58,451	67,395
Providence Community Action Program, Inc.	307	1,339
U.S. Department of Housing and Urban Development.....	65,526	26,250
RI Department of Education	-	56,139
Providence/Cranston Workforce Development	-	20,225
RI Department of Planning and Development	13,142	5,502
RI Department of Corrections	-	73,591
Total	<u>\$375,794</u>	<u>\$449,582</u>

Grants and accounts receivable are stated at the amount management expects to collect from outstanding balances. Management provides for probable uncollectible amounts through a provision for bad debt expense and an adjustment to a valuation allowance based on its assessment of the current status of individual receivables from grants and contracts. The allowance for doubtful accounts was \$0 at June 30, 2012 and June 30, 2011.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.**NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011****4. LAND, BUILDING, AND EQUIPMENT**

At June 30, 2012 and 2011, land, building and equipment consisted of the following:

	<u>2012</u>	<u>2011</u>
Non-depreciable:		
Land	\$ 525,078	\$ 525,078
Construction in progress	502,968	477,046
Depreciable:		
Buildings and improvements	4,907,195	4,907,195
Furniture and equipment	153,028	153,028
Transportation equipment	114,085	114,085
	<u>6,202,354</u>	<u>6,176,432</u>
Less: accumulated depreciation	<u>(2,207,073)</u>	<u>(2,028,524)</u>
Total	<u>\$ 3,995,281</u>	<u>\$ 4,147,908</u>

5. NOTE PAYABLE

On February 17, 2011 the Organization entered into a revolving line of credit agreement with a bank for up to \$400,000. The line of credit is secured by real estate, and bears an interest rate of 1.75% above the bank's prime rate (currently 5.0%).

On January 24, 2012 the Organization entered into a loan modification agreement with the bank extending the availability of the line of credit until January 31, 2013. All terms, conditions and covenants contained in the original loan agreement remain in full effect for the duration of the modification.

At June 30, 2012 and 2011, there was \$339,000 and \$314,000 outstanding on this line, respectively. Interest paid on the line of credit was \$15,199 for June 30, 2012 and \$15,437 for June 30, 2011.

6. LONG-TERM DEBT

Long-term debt at June 30, 2012 and 2011 consisted of the following:

	<u>2012</u>	<u>2011</u>
Non-interest bearing, forgivable note payable to Rhode Island Housing Mortgage and Financing Corporation, no monthly payments, with the balance of the indebtedness forgivable over 10 years beginning with the eleventh year. The property is used for low-income apartments	\$ 60,000	\$ 60,000
Non-interest bearing note payable to Rhode Island Housing Mortgage and Financing Corporation, due upon sale of property, secured by real estate	30,000	30,000
7.2% mortgage note payable to bank, secured by real estate, due in monthly installments of \$873, including interest, until July 2012, at which time the remaining balance is due	891	11,700
7.01% note payable to bank, due in monthly payments of \$776 until June 2009; refinanced on July 2009 at 6.94%, due in monthly installments of \$1,013, including interest, until July 2019, at which time the remaining balance is due	67,778	75,443

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.**NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011****6. LONG-TERM DEBT (CONTINUED)**

Non-interest bearing note payable to Rhode Island Housing Mortgage and Financing Corporation, secured by real estate, no monthly payments, with the entire balance due in 2038.....	186,517	186,517
Non-interest bearing note payable to Rhode Island Housing Mortgage and Financing Corporation, secured by real estate, no monthly payments, with the entire balance due in 2038.....	55,000	55,000
Total long-term debt	400,186	418,660
Less: current portion.....	(8,592)	(17,220)
Net long-term debt	<u>\$391,594</u>	<u>\$401,440</u>

The above non-interest bearing and below market rate notes were issued solely for cash, with no other rights or privileges exchanged. As a result, cash received is equivalent to the face value and no interest has been imputed in accordance with GAAP.

Interest expense incurred on long-term debt for the years ended June 30, 2012 and 2011 was \$4,166 and \$8,083, respectively.

Future maturities of long-term debt for years ending June 30 are as follows:

2013.....	\$ 8,592
2014.....	8,253
2015.....	8,844
2016.....	9,478
2017.....	10,157
Thereafter.....	354,862
Total	<u>\$ 400,186</u>

7. NET ASSETS

Temporarily restricted net assets at June 30, 2012 and 2011 consisted of the following:

	<u>2012</u>	<u>2011</u>
Champlin Foundation.....	\$159,628	\$ -
Scholarship Fund.....	-	10,495
Total	<u>\$159,628</u>	<u>\$10,495</u>

Permanently restricted net assets at June 30, 2012 and 2011 consisted of the following:

	<u>2012</u>	<u>2011</u>
Scholarship fund.....	\$ 10,000	\$ 10,000
Revolving loan fund.....	35,000	35,000
Total	<u>\$ 45,000</u>	<u>\$ 45,000</u>

Unrestricted net assets at June 30, 2012 and 2011 consisted of the following:

	<u>2012</u>	<u>2011</u>
Designated for building campaign fund.....	\$ 5,178	\$ 5,178
Designated for Urban League Guild.....	3,023	5,085
Investment in land, building and equipment.....	3,595,095	3,729,248
Undesignated.....	(488,864)	(264,172)
Total	<u>\$ 3,114,432</u>	<u>\$ 3,475,339</u>

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.

NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011

8. PENSION PLANS

The Organization maintains a defined contribution retirement plan covering all eligible employees. Employees may contribute up to the maximum allowed by the existing federal income tax law. The Organization matches 25% of the employees' contribution, not to exceed 6% of the employees' compensation. Pension expense for the years ended June 30, 2012 and 2011 was \$6,576 and \$7,985, respectively.

Under the terms of an employment agreement with the Executive Director, the Organization contributes 6% of the Executive Director's salary to a deferred contribution retirement plan.

9. DONATED SERVICES AND PROPERTY

The Organization receives donated services from a variety of unpaid volunteers assisting with administrative and program services. No amounts have been recognized in the accompanying statement of activities because the criteria for recognition of such volunteer effort under GAAP have not been satisfied.

10. COMMITMENTS AND CONTINGENCIES

The Organization has received federal and state grants for specific purposes that are subject to audit by the grantors or their representatives. Such audits could lead to request for reimbursement to the grantor agency for expenditures disallowed under terms of the grant. Management believes such disallowances, if any, would be immaterial.

The Organization is obligated under the terms of a deed restriction to remain the primary user of the real property located on Prairie Avenue for the purpose of promoting public good. If these restrictions are not met, the City of Providence may take possession of the property.

During 2007, the Organization received funding under the Thresholds Grant. The purpose of this grant is to secure housing for mental health consumers who do not require 24-hour supervision. The Organization received an amount up to \$209,986 from the Thresholds grant for the acquisition and rehabilitation of property located on Slater Street, Pawtucket, Rhode Island. The agreement stipulates that twenty-two beds in this unit shall be made available to mental health consumers selected by the Department of Mental Health, Retardation and Hospitals (MHRH). The proceeds from this grant do not have to be repaid as long as the units are rented according to the terms of the agreement for a period of 40 years. Management intends to comply with the use restrictions and accordingly, no liability has been recorded at June 30, 2012.

During fiscal year 2008, the Organization received funding under the HOME Investment Partnership Program. The purpose of the HOME Program is to expand the supply of decent, safe, sanitary, and affordable rental housing and homeownership through acquisition, new construction and/or rehabilitation of housing through tenant-based rental assistance using a combination of funds from public and private sources. The Organization received an amount up to \$270,328 and \$276,514 from the HOME Program for the development of four rental units for very low-income households located on Oxford Street in Providence, Rhode Island, and eleven rental units located on Slater Street in Pawtucket, Rhode Island, respectively. The proceeds from this grant do not have to be repaid as long as the apartments are rented to qualifying low-income tenants for a period of 40 years. Management intends to comply with the use restrictions and accordingly, no liability has been recorded at June 30, 2012.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.NOTES TO THE FINANCIAL STATEMENTS
JUNE 30, 2012 AND 2011

10. COMMITMENTS AND CONTINGENCIES (CONTINUED)

During fiscal year 2008, the Organization received funding under the Neighborhood Opportunities Program (NOP). The purpose of the NOP Program is to increase the supply of decent, safe, sanitary, and affordable rental housing for very low, low and moderate-income families and individuals and revitalize local neighborhoods. The Organization received an amount up to \$200,000 and \$250,000 from the NOP Program for the acquisition and rehabilitation of four rental units located on Oxford Street in Providence, Rhode Island, and eleven permanent supportive housing units located on Slater Street in Pawtucket, Rhode Island, respectively. The proceeds from this grant do not have to be repaid as long as the apartments are rented to qualifying low-income tenants for a period of 30 years. The contract stipulates that for each year after year ten, the Organization's repayment amount will be reduced by 5% per year in which the units have been used for the Program. Management intends to comply with the use restrictions and accordingly, no liability has been recorded at June 30, 2012.

During fiscal year 2008, the Organization received funding under the Fire Code Compliance Program. The purpose of this program is to provide funding for the improvement required to meet the Fire Safety Code of existing affordable housing previously funded by Rhode Island Housing. The Organization received an amount up to \$120,500 from the Fire Code Compliance Program for the Fire Safety engineering and construction conducted at the property located on Slater Street in Pawtucket, Rhode Island. The proceeds from this grant do not have to be repaid, but must be used for the purpose specified in the grant agreement.

11. FUNCTIONAL ALLOCATION OF EXPENSES

The costs of providing the various programs and other activities of the Organization have been summarized on a functional basis in the statement of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

(CONCLUDED)

**Report on Procedures
Performed at Urban League of
Rhode Island, Inc.**

February 13, 2014

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Objectives

1. Sansiveri, Kimball & Co., L.L.P. ("SK") was engaged to perform certain forensic accounting services as requested by the Executive Office of the City of Providence, Rhode Island ("City").

Background Information

2. The ULRI is a non-profit organization located in the City of Providence, Rhode Island. It is an established affiliate of the National Urban League, Inc. ULRI's purpose is to assist in developing solutions to improve conditions in problem-ridden communities affected by racial inequalities. By finding and creating opportunities for employment and training, housing, education and health and welfare, ULRI hopes to realize its mission.
3. South Providence Development Corporation ("SPDC") (a non-profit organization) and CleanScape, Inc. ("CleanScape") (a for profit organization) share a common (but not identical) board of directors with ULRI. These entities are separate legal entities from ULRI and are not consolidated into the audited financial statements of ULRI because they do not meet the economic interest test under generally accepted accounting principles. The administrative staff of ULRI, however, maintains the books and records of SPDC.
4. In September 2013, ULRI entered into a Purchase & Sale Agreement ("P&S") with The Aspen Group, Inc. ("Aspen"). The P&S is for the sale of the real property located at 246 Prairie Avenue in Providence, Rhode Island at a price of \$2,625,000.00. The purchase price was to be received as an initial deposit of \$32,812.50 to be held in escrow by an escrow agent and an additional deposit of \$32,812.50 also to be held in escrow. The balance of \$2,559,375.00 is to be received at the closing.
5. The real property located at 246 Prairie Avenue is subject to a deed restriction whereby ULRI must remain the primary user of that property for the purpose of promoting public good. If these restrictions are not met, the City of Providence could take possession of the property. There is currently a resolution pending in the City of Providence to remove the deed restrictions from the property.
6. As of September 7, 2013, ULRI had approximately 43 employees on their payroll as follows:
 - a. Administration – 6
 - b. Minority Adoption – 9
 - c. Safe Haven 1 & 2 – 14
 - d. Education – 2
 - e. Men & Women's Shelter – 12

7. Although ULRI had been experiencing cash flow issues for several years, in early 2013, ULRI became unable to pay certain liabilities including payroll liabilities to employees, liabilities to vendors, banks and to other creditors.
8. The board of ULRI has a plan whereby the Organization would sell the real property at 246 Prairie Avenue, use the funds to pay their current and past due liabilities of ULRI and move its operations to SPDC's location on 17 Gordon Avenue, Providence, Rhode Island. In connection with this plan, ULRI would also plan to satisfy certain obligations of SPDC in addition to incurring additional expenses to renovate the space at 17 Gordon Avenue and move their operations to this facility. Thus, the board of ULRI has approached the City, informed them of the plan and requested a removal of the deed restriction on the 246 Prairie Avenue property. It is in connection with this request that the City has commissioned certain forensic accounting procedures to verify certain financial information on behalf of the City in their consideration of this request.
9. It should be noted that SK worked primarily with the Chief Financial Officer (Steve Muchiri) and Human Resources Director (Leslie Thompson) of ULRI. SK also had some discussions with the Executive Director (Dennis Langley), certain board officers (Norman Orondenker, Secretary and Lawrence Brown, Treasurer) and their auditor (Peter Chatellier of Marcum LLP formerly Braver PC). It should be noted that the ULRI accounting staff has been reduced from as many as four individuals at one time to one individual currently due to financial resource constraints. SK had limited access and time with these individuals since our field work could not begin until Friday January 24, 2014 and had to be completed by Friday January 31, 2014. Subsequent to January 31, 2014, SK was informed that the Chief Financial Officer and the Human Resources Director would not be working at ULRI and would be unavailable to us. In addition, the Organization's Executive Director announced his retirement soon after January 31, 2014, the date that we were required to finish our field work. A few inquiries were responded to by ULRI subsequent to January 31, 2014, but there were a number of SK inquiries that were not responded to subsequent to January 31, 2014 for lack of information or lack of personnel available to respond to those inquiries. Thus, there will be references later in this report that indicate that SK was unable to obtain any further information from management about various items. It should be noted however, that these individuals fully cooperated with and assisted SK during our field work.

Scope of the Investigation

10. The specific accounting services requested by the City and agreed to by the City are as follows:

- a. Verify and calculate where necessary, the outstanding liabilities of Urban League of Rhode Island, Inc. ("ULRI" or "Organization") as of the current date compared to the schedule provided to the City dated January 8, 2014 (Current date was agreed with the City to be determined based on the most current information available during our field work which was completed on January 31, 2014).
- b. Verify and calculate where necessary, the outstanding liabilities of South Providence Development Corp. as of the current date compared to the schedule provided to the City dated January 8, 2014 (Current date was agreed with the City to be determined based on the most current information available during our field work which was completed on January 31, 2014).
- c. Review the circumstances surrounding the use of certain R.I. Housing grant funds to allegedly pay non-program payroll
- d. Review the circumstances surrounding the alleged co-mingling of certain SSI monies
- e. Obtain and review a prior forensic audit report (from approximately 2010)
- f. Interview former external auditor, if possible
- g. Interview the Board Treasurer, if possible
- h. Review Board minutes for the prior three years
- i. Assess the Organization's monthly non-program spending burden for facilities and administrative expenses
- j. Prepare a written report of our procedures and findings

11. This engagement was performed under AICPA Standards for Consulting Services. These services were not performed under AICPA Attestation Standards. We did not perform an audit of the financial statements of ULRI under U.S. Generally Accepted Auditing Standards and therefore provide no opinion or assurances regarding ULRI's financial statements nor have we formed any opinion on the effectiveness of internal control over financial reporting. Also, we make no representation regarding the sufficiency of the procedures described above as determined by the City either for the purpose for which this report has been requested or for any other purpose.

Procedures Performed and Findings - Based on Scope of Work as Outlined by the City of Providence

Outstanding Liabilities of ULRI

12. ULRI has presented a listing to the City of their projected and current unpaid liabilities of ULRI as of January 8, 2014 of \$1,496,778 detailed on Schedule 1. SK has attempted to verify these liabilities by individual category. Our findings are outlined in this section of the report. See Schedule 1 for the ULRI listing of projected and future liabilities and the SK determined amounts for those same liabilities.

13. Accounts payable for the General Fund per ULRI as per the January 8, 2014 listing was \$213,659. SK obtained an aged accounts payable report as of January 24, 2014 which totalled \$111,969. All of these amounts were aged over 90 days. The invoice dates on this report range from June 2012 through December 2013. There were no amounts listed that were less than 90 days old. Certain unpaid invoices that had been received by ULRI had not yet been entered into the accounting system due to the limited staffing in the accounting department. There were a number of unpaid invoices to be entered into the accounting system. Upon request, the finance department entered these invoices in the system and generated a new accounts payable report as of January 30, 2014 which totalled \$154,142 of which \$42,268 was current and the remainder of the open invoices were over 90 days old. The largest current invoice was to the National Urban League in the amount of \$35,000. Some of the more significant unpaid payables on the January 30, 2014 aged accounts payable report were utilities and health insurance. We questioned the CFO as to whether there were any accounts payable for which an invoice had not been received and were told that these unentered invoices were the only additional invoices all that he was aware of that needed to be recorded at that time.

14. Accounts payable for the South Providence Neighborhood Center ("SPNC") per ULRI as per the January 8, 2014 listing was \$15,000. SPNC is the property located at 246 Prairie Avenue and is not a separate legal entity but rather a part of ULRI. SK obtained an aged accounts payable report as of January 29, 2014 which totalled \$1,935. The invoice dates on this report range from August 2013 through October 2013. There were no amounts listed that were less than 90 days old. Many unpaid invoices had not yet been entered into the accounting system due to the limited resources in the accounting department. Thus, SK has obtained and totalled all of the unpaid invoices for SPNC through 12/11/2013 that had not yet been entered into the accounting system. These invoices total \$13,136 and are dated from 7/1/2013 to 12/11/2013. This brings the total accounts

payable for SPNC at \$15,071 as of December 11, 2013. The outstanding accounts payable for SPNC are primarily for utilities.

15. There is a retainage amount payable to C&D Construction Co., Inc. related to the building addition to the 246 Prairie Avenue property. The outstanding amount of this retainage as of January 31, 2014 is \$10,070.
16. Vacation to be accrued per ULRI as per the January 8, 2014 listing was \$200,000. SK obtained a schedule titled Vacation Balances as of October 2010 which totalled \$107,767 and represents balances due to six individuals as of June 30, 2010. Some of these balances date as far back as 1986. The balance of accrued vacation on the November 30, 2013 internal general fund balance sheet was \$107,812. It should be noted that this balance represents accrued vacation to six individuals. For five of those individuals, the schedule indicates that it is for vacation hours from 2009 and 2010. For the sixth individual, it represents approximately 1,600 hours due to one individual. SK did not perform any procedures to verify the accuracy of either the hours or dollars of this portion of accrued vacation.
17. SK was provided with a schedule of additional vacation accruals that had not been accrued on the internal balance sheet as of November 30, 2013. These additional amounts represent additional accrued vacation for fiscal years ended June 30, 2011, June 30, 2012, June 30, 2013 and the six months ended December 31, 2013. This schedule was compiled by the Human Resources Director. Per this schedule, the total of the accrued vacation for the period from July 1, 2010 through December 31, 2013 is \$37,486. SK did not perform any procedures to verify the accuracy of either the hours or dollars of this portion of accrued vacation. Thus, the total accrued vacation as of December 31, 2013 is \$145,253 and does not include any additional vacation amounts earned or used in 2014.
18. The most current Employee Handbook (dated 2/2004) provided by ULRI to SK states that the vacation policy for unused vacation is "Vacation time not used during one calendar year cannot be used during the succeeding calendar year unless approved by the Executive Director. Staff members cannot work for the Urban League during a vacation period to earn extra salary either at their own request or for the convenience of the Organization. The Executive Director may allow exceptions if deemed necessary." Although SK has listed the amounts for accrued vacation on **Schedule 1** as an outstanding liability and although accrued vacation has been historically recorded as a liability on the ULRI's financial statements, SK is not clear on the interpretation of the Organization's policy as to whether an employee is eligible to receive payment for unused vacation

upon termination of employment. SK believes that this question is better answered by human resource and legal professionals.

19. **Schedule 2** shows the bi-weekly payroll periods from 2/10/2013 through 1/25/2014. The bi-weekly pay period ended 1/25/2014 was the last bi-weekly period where time cards had been submitted while we were performing our field work. Of the 25 pay periods shown on this schedule, there were 15 bi-weekly payroll periods that have been paid and 10 bi-weekly payroll periods that currently remain unpaid as of the date of completion of our fieldwork on January 31, 2014. It can be noted from this schedule that starting as early as February 2013, payrolls were not paid timely. Bi-weekly pay periods start on Sunday and end the following Saturday. The payroll due date is the Friday after the end of the pay period. You will see that between February 2013 and May 2014, payrolls were being paid approximately 4 to 6 days late. By June 2013, they were being paid almost a month late and by November 2013 (the last payroll paid), they were being paid two months late.
20. Accrued payroll per ULRI's January 8, 2014 listing was \$306,759. This number was developed by management of ULRI by taking the last paid bi-weekly payroll (pay period ending 9/7/2013) of approximately \$38,400 and using that as a base to estimate the eight unpaid payrolls at that time.
21. Since the January 8, 2014 listing was prepared, there are currently ten unpaid bi-weekly payrolls through the pay period ending 1/25/2014. SK has calculated the amount of unpaid gross payrolls by taking the rates of pay from the last payroll paid for the pay period ended 9/7/2013 and using employee hours from time cards submitted by employees for those ten bi-weekly periods. SK did not verify the accuracy of the time cards but did note that in many cases time cards for hourly employees were signed by a supervisor. The time cards submitted for salaried employees generally showed that those employees had either worked full time or used vacation or sick time during the time periods that they were not paid. SK was unable to verify that all salaried employees had worked the hours reported on their time cards during these periods and thus relied on the time cards submitted by these employees. The amount of gross unpaid payrolls based on SK's calculation is \$292,119. This number does not include any payroll taxes or other employee benefits. Using a 12% factor for payroll taxes as an estimation, the payroll taxes due if and when these payrolls are ultimately paid would be approximately \$35,054.
22. SK is also aware that litigation has been filed by certain employees in the Safe Haven program to claim wages owed to them. Other than the payroll liabilities for the payroll periods 39, 41, 43, 45, 47 and 49 (which cover from 9/8/2013 through 11/30/2013), there have been no additional liabilities included in the SK calculation of accrued payroll for Safe Haven employees. SK has not

been provided with any time cards for the Safe Haven employees for payroll weeks 51, 1, 3 and 5. Management of ULRI had informed us that these employees have been paid with RIH funds from 12/1/2013 through 12/28/2013. Management of ULRI has also informed us that the payroll for these employees for the period from 12/29/2013 through 2/8/2014 has not been paid as of February 13, 2014. Those payrolls are expected to be processed and paid with RIH funds during the week beginning February 17, 2014. RIH has provided us with the amounts paid to the Safe Haven employees subsequent to 11/30/2013. RIH records are consistent with management's representations except that four Safe Haven salaried employees were paid by RIH for the weeks ended 11/23/2013 and 11/30/2013. It is uncertain at this time why only four out of the twelve employees were paid for those two weeks. Also, it was noted that the rate of pay that was paid for the Safe Haven employees restored the 10% pay cuts that had previously been made to all ULRI employees (see paragraph 56 below). Thus, we have not included any amounts owed to the Safe Haven employees for any date subsequent to 11/30/2013 in our calculations and for the four employees that were paid for the weeks ended 11/23/2013 and 11/30/2013. If the information received from RIH and ULRI is not accurate, then additional payroll amounts might be owed. With respect to the Safe Haven employees, SK has included the six Safe Haven salaried employees vacation accrual in the accrued vacation liability through December 31, 2013.

23. Four employees filed Claims for Unpaid Wages with the RI Department of Labor and Training. These claims were filed at different times by these employees. Manual checks were issued to these four employees for their unpaid wages less any applicable taxes. Three other employees were given a pay advance which was authorized by the Organization's Executive Director. The applicable withheld payroll taxes and employer payroll taxes have not yet been paid on these wages as of the completion of our fieldwork. These amounts had been entered into the online ADP system (ULRI's payroll processor) and will get transmitted on the next occasion when ULRI transmits payroll data to ADP. The amount of withheld payroll taxes to be remitted on these manual payroll checks is \$3,156, not including any employer taxes. In addition to the manual checks that were issued to these employees, 32 employees were given Christmas bonuses of \$500 each in December 2013.
24. **Schedule 3** represents to the best of our knowledge based on the facts presented to us, a listing by employee of amounts owed for unpaid payroll through January 25, 2014 and for accrued vacation through December 31, 2013 based on the calculations performed by SK as noted above.

25. It was brought to our attention that the Organization's Blue Cross coverage was cancelled for non-payment of premiums effective October, 2013. There is still a balance due to Blue Cross in the amount of \$47,937 included in accounts payable for the months of August 2013 through October 2013.

26. ULRI maintains a defined contribution retirement plan (403(b) plan) covering all eligible employees. Employees may contribute up to the maximum allowed by the existing federal income tax law. The Organization matches 25% of the employees' contribution, not to exceed 6% of the employees' compensation. Pension expense for the years ended June 30, 2012 and 2011 was \$6,576 and \$7,985, respectively. The account payable listing as of January 30, 2014 shows approx. \$1,600 due to MetLife for amounts due under this plan. SK was unable to obtain any further information from management about this plan including the funding status of this plan and thus we are uncertain if any unfunded liabilities exist relating to this plan.

27. Under the terms of an offer letter to the Executive Director, the Executive Director is entitled to receive a "retirement benefit of 6% of annual salary plus employer match up to 6%". SK has requested additional details of this plan but was unable to obtain any additional information related to this plan from the CFO, the board Secretary, board Treasurer or the Organization's audit firm. Per the CFO, ULRI has historically contributed 6% of the Executive Director's salary to an account which has been set up at a financial institution. In more recent years, the Organization was funding \$550 per month towards this liability. The last payment that was made to this account was on September 2, 2010. Thus, there is an additional 40 months owed from October 2010 through January 2014 which amounts to \$22,000. SK was unable to obtain any further information from management about this plan including the funding status of this plan and thus we are uncertain if any unfunded liabilities exist relating to this plan. **Schedule 4** shows the salary history of the Executive Director of the Organization with a calculation of a "retirement benefit of 6% of annual salary plus employer match up to 6%". This calculation was performed by SK and was based solely on an unsigned offer letter in Mr. Langley's personnel file and has not been corroborated with any plan document, if such document exists or with any plan advisor, if there is one. If this calculation is accurate, it implies that a benefit of approximately \$185,000 would be due to Mr. Langley. Again, since SK has not seen any account statements related to the account where the Organization was depositing the \$550 per month, it is unclear to SK if this obligation is fully funded, partially funded or not funded at all. It is also not clear as to the ownership of that investment account - whether it belongs to the Organization, to Mr. Langley or held in trust for the benefit of Mr. Langley.

28. ULRI has a \$400,000 line of credit with Bank of America. The balance outstanding on this line of credit as of January 31, 2014 is \$394,000. Past due interest including interest due through January 33, 2014 is \$11,231. On January 13, 2014, Bank of America informed ULRI that it would be issuing a demand for payment in full due to non-payment of monthly obligations.
29. ULRI has a mortgage note payable with Bank of America secured by one of their real estate properties (Potters Avenue). ULRI also owns approximately ten properties. The principal balance outstanding on this note as of January 16, 2014 is \$56,127. This mortgage note requires monthly payments of principal and interest of \$1,013. As of January 16, 2014, ULRI was current on this obligation to Bank of America.
30. The City of Providence entered into a \$50,000 Credit Line Loan Agreement with ULRI on July 18, 2013. A \$45,000 advance was made on this credit line on August 2, 2013. The line bears interest at zero percent. The first principal payment is due on August 15, 2014.
31. ULRI has several bank accounts. Its primary account is its General Fund checking account with Bank of America. In December 2013, the daily balance of cash in the bank balance ranged from a low of approximately \$400 to a high of approximately \$36,000. In January 2014, the daily balance of cash in the bank balance ranged from a low of approximately \$8,000 to a high of approximately \$26,000. These balances fluctuated due to the timing of cash receipts from programs from various governmental agencies and from rental receipts. From July 2012 through December 2013, the Organization had anywhere from approximately \$70,000 to \$130,000 in outstanding checks representing checks that were prepared but not mailed due to lack of funds in the checking account to cover these checks. At December 31, 2013, there was \$79,409 of outstanding checks. Many of these checks are fairly old and would be considered to be "stale-dated" checks. Some of them date as far back as January 2012 and a number of them are dated from January 2012 through December 2013. Only \$5,033 of these checks cleared the bank in January 2014. Although many of these checks are old and stale and potentially should be voided and removed from the outstanding check list, many of these items may still be liabilities of the Organization. We have not performed any additional procedures with respect to these outstanding checks, such as determining if the liabilities still exist to these vendors, but we could increase the scope of our work and do so at the request of the City.
32. ULRI listed a projected future liability of \$185,000 to the Champlin Foundation ("Champlin"). The Organization was awarded a grant from Champlin in November 2011. The Organization used these funds along with funds from several government grants to build a 15,000 square foot facility expansion to its Prairie Avenue building. The Organization believes that if the City of Providence

removes the deed restriction and allows the building to be sold, then the Champlin grant monies must be returned to Champlin. The Organization has not provided SK with any documents other than the grant award letter and page 1 of the grant agreement. It is unclear to SK from these two documents if these monies are required to be returned to Champlin under the terms of the agreement. Additional grant documents and possibly a legal opinion would be needed to determine if this would be a future liability of the Organization in the event that the building is sold.

33. As noted above, ULRI also used funds awarded under several government grants to build the 15,000 square foot facility expansion to its Prairie Avenue building in addition to the funds received from Champlin. These grants were from HUD and from the City of Providence as a subrecipient administering several grants from the United States Government under Title I of the Housing and Community Development Act of 1974. Additional grant documents and possibly a legal opinion would be needed to determine if there is any liability of the Organization to return any grant funds in the event that the building is sold and to determine if funds were properly utilized in accordance with the grant provisions of HUD and the City of Providence

Outstanding Liabilities of SPDC

34. ULRI has presented a listing to the City of their projected and current unpaid liabilities of SPDC as of January 8, 2014 of \$750,401 detailed on Schedule 5. SK has attempted to verify these liabilities by individual category. Our findings are outlined in this section of the report. See Schedule 5 for the ULRI listing of projected and future liabilities of SPDC and the SK determined amounts for those same liabilities.
35. Accounts payable for SPDC per ULRI as per the January 8, 2014 listing was \$53,535. SK obtained an aged accounts payable report for SPDC from the CFO as of January 29, 2014 which totalled \$32,968. Almost all of these amounts were aged over 90 days. The most significant unpaid payables on the January 29, 2014 aged accounts payable report for SPDC were for utilities.
36. Providence Economic Development Partnership, Inc. f/k/a Providence Economic Development Corporation ("PEDC") extended a loan to SPDC in an original principal amount of \$362,685. SPDC has defaulted on that loan. PEDC entered into a Forbearance Agreement with SPDC in March 2012 (a copy of which was obtained from the City). The principal balance on the loan as of February 1, 2012 was \$281,238. That is still the principal balance as of January 31, 2014. Per a December 22, 2013 statement obtained from the CFO, the interest and late fees through January 1, 2014 is \$28,506 for a total balance due of \$309,744. The maturity date of this loan is March 1, 2013.

37. SPDC was a guarantor of a loan from PEDC to CleanScape, the for profit subsidiary of SPDC. CleanScape's former building was sold and the purchaser of that building assumed \$342,000 of the outstanding loan balance leaving a shortfall of \$58,131. Although CleanScape went into receivership/bankruptcy, based on the information that has been provided to date, it appears that PEDC could still pursue SPDC for the shortfall of \$58,131 plus interest, late fees, attorney fees and collection costs. A legal opinion would most likely be needed to determine if this shortfall amount is a liability of SPDC as guarantor of the CleanScape debt.
38. Interest on the shortfall amount of \$58,131 discussed in the previous paragraph has not been calculated by PEDC, however SK estimates that interest would be approximately \$3,500 based on a 3% interest rate on the loan for the 24 month period from February 1, 2012 through January 31, 2014. Late fees, attorney fees and collection costs have not been estimated.
39. In their plan to sell the 246 Prairie Avenue property and relocate to SPDC's facility at 17 Gordon Avenue, ULRI management has estimated that they will need approximately \$250,000 for expenses to renovate the Gordon Avenue building and to move their operations to that building. Management has not supplied us with any calculations or documents supporting this projected amount.
40. SPDC has a line of credit with Bank of America. This loan has been placed with a debt collector, Convergent Outsourcing, Inc. ("Convergent"). The balance per a letter dated January 19, 2012 from Convergent shows a "Current Balance " of \$78,041. It is unclear from this letter if this amount includes interest and other costs through January 19, 2012 or only represents the principal balance. In any event, there would be additional interest that would have accrued from January 2012 through January 2014. Management could not provide us with any other documentation including more current communications with Convergent or any of the original loan documents. Thus, accrued interest on this loan has not been reflected in the SK amounts.
41. There has been a tax sale of the 21 Gordon Street property owned by SPDC. For 2010 taxes (payable Jul10-Jun11) and 2011 taxes (payable Jul 11-Jun 12), the property was listed at tax sale on 6/20/12 and a lien was recorded in the amount of \$26,629 and is currently unredeemed. For 2012 taxes (payable Jul 12-Jun 13), the property was listed at tax sale on 5/22/13 and a lien was recorded in the amount of \$12,525 and is currently unredeemed.
42. Keith Fernandes has purchased one of the tax liens on the property (for the 2010 and 2011 taxes) and has entered into a Promissory Note agreement with ULRI. ULRI is the Maker of the note although SPDC owned the property at Gordon Street. The note is dated August 14, 2014 and the principal amount of the note is \$34,525. The interest rate is 15% per year with a default rate of

18%. The maturity date of the note is February 14, 2014 however ULRI may extend the maturity date of the note to August 13, 2014 with the payment of a fee of \$1,381. The interest listed in Schedule 5 has been calculated at the 18% default rate on the note for a period from August 14, 2013 through January 14, 2014. The 2012 tax lien is still outstanding and is reflected as a liability with an estimate of interest. No other collection or attorney costs or fees appear in this estimate.

Rhode Island Housing Grant – Safe Haven

43. In the scope of work requested by the City, SK was requested to review the circumstances surrounding the use of certain R.I. Housing grant funds to allegedly pay non-program payroll. SK did not perform an audit of the sources and uses of the grant funds and did not perform any procedures to determine if ULRI was in compliance with provisions of the grant, but rather performed very limited procedures with respect to this payroll issue and draw down requests submitted to RIH under this grant. Given certain ongoing litigation surrounding this grant program, SK did not do any further investigation of this issue.

SSI Monies

44. ULRI functions as a representative payee for some of its clients and residents of their shelters. A representative payee is an individual or organization appointed by Social Security Administration (“SSA”) to receive Social Security and/or SSI benefits for someone who cannot manage or direct someone else to manage his or her money. The main responsibilities of a payee are to use the benefits to pay for the current and foreseeable needs of the beneficiary and properly save any benefits not needed to meet current needs. A payee must also keep records of expenses. When SSA requests a report, a representative payee must provide an accounting to SSA of how benefits were used or saved.
45. A representative payee acts on behalf of the beneficiary. A payee is responsible for everything related to benefits that a capable beneficiary would do for himself or herself. SSA encourages payees to go beyond just managing finances and to be actively involved in the beneficiary’s life. The following lists the required duties of a payee per SSA’s website:

Required Duties:

- Determine the beneficiary’s needs and use his or her payments to meet those needs;
- Save any money left after meeting the beneficiary’s current needs in an interest bearing account or savings bonds for the beneficiary’s future needs;
- Report any changes or events which could affect the beneficiary’s eligibility for benefits or payment amount;
- Keep records of all payments received and how they are spent and/or saved;

- Provide benefit information to social service agencies or medical facilities that serve the beneficiary;
- Help the beneficiary get medical treatment when necessary;
- Notify SSA of any changes in the payee's circumstances that would affect their performance or continuing as payee;
- Complete written reports accounting for the use of funds; and
- Return any payments to which the beneficiary is not entitled to SSA.

46. SSA's website states that "a checking account is better in some ways, because you will have cancelled checks and/or statements that show how the funds are spent. In making the decision to use a checking account, you should consider the fact that some beneficiaries cannot maintain high enough balances to avoid service charges. But if you must pay bills through the mail, a checking account would still be cost effective because cashier's checks and money orders have charges associated with them, as well. You should set up an account that minimizes fees and enables you to keep clear records. SSA encourages interest-bearing accounts. The bank account must be titled so that it is clear that the money in the account belongs to the beneficiary."

47. Since ULRI functions as a representative payee for some of its residents and clients, it receives monthly SSI payments for the beneficiaries and makes payments of amounts for rents, food and other items for these individuals. The payments being made for certain items like food are usually made to the individuals on a weekly basis. ULRI maintains a ledger sheet for each beneficiary detailing the monies received on behalf of the individual and monies expended for or to the beneficiary. These ledger sheets maintain a balance of amounts being held by ULRI for each beneficiary at any point in time.

48. ULRI deposits these funds into its General Fund checking account and makes the disbursements to or on behalf of the beneficiaries out of this checking account. Weekly, the ULRI finance department prepares a summary sheet which totals the ledger sheets and transfers an amount into or takes amounts out of the ULRI money market account leaving a balance in the money market account which at least equals or exceeds the total of the ledger sheets of amounts being held in custody for the SSI beneficiaries. SK reviewed the SSI summary sheet for January 13, 2014 which listed 17 beneficiaries of which 14 listed balances being held by ULRI. SK also reviewed the individual ledger sheets for the 17 beneficiaries to see that they were properly reflected on the SSI summary sheet. The total balances that should be held in custody for the SSI beneficiaries as of January 14, 2014 was \$4,990. On January 14, 2014, there was \$6,548 being held in the money market account of which \$4,990 was being held in custody for the SSI beneficiaries. A \$4,000 deposit was made on January 10, 2013 into the money market account representing the

approximation of the SSI custodial balances as of that date. The title of this account is Urban League Rhode Island, Inc. and it is not clear that the money in the account belongs to the beneficiary; however per management of ULRI, it has been and continues to be the practice of ULRI to use this account primarily as the bank account holding the custodial funds.

49. SK reviewed the detailed ledger sheets for these 17 individuals which showed the balances carried forward from July 1, 2013 and all of the activity for each beneficiary from July 1, 2013 through January 14, 2014. These detailed ledger sheets showed the receipt of monthly SSI payments as well as monthly rent payments for the beneficiaries and weekly food payments as well as the monthly service fee other miscellaneous items. SK traced all of the rent payments and all of the food payments during this period to the ULRI check register for this period without exception.
50. SSA visited with ULRI on March 6, 2013 to perform a review as part of their continuing oversight responsibility in monitoring representative payee performance. SSA issued a letter report dated April 19, 2013 which had three findings and four recommendations. The findings dealt with issues such as exceeding the resource limit for a beneficiary by approximately \$700, a delay in reporting changes for three beneficiaries to SSA that have an immediate effect on a beneficiary's monthly payment and continued receipt of paper checks. The recommendations were to report events to SSA timely, implement representative payee software to manage individual accounts, more closely monitor beneficiary balances to make sure that they do not exceed the SSI resource limit. There was no mention in the report of any improper handling of funds, including comingling of funds, improper titling of accounts, etc.
51. In accordance with the scope of services as requested by the City as outlined above, we did not perform any procedures to determine whether the SSI monies received by ULRI were properly used for the designated and required purposes under the rules and regulations of the SSA. Our procedures strictly looked into the issue of alleged co-mingled funds.

Prior Forensic Audit Report

52. In January 2011, the CFO of ULRI suspected fraudulent activity which led to an internal investigation of certain transactions. Subsequent to the internal investigation, ULRI engaged Braver PC to determine the amount of funds that were misappropriated from ULRI. In March 2012, Braver PC issued their report indicating that there was approximately \$48,000 of unauthorized cash disbursements, approximately \$138,000 of unauthorized payments to unauthorized vendors and approximately \$65,000 of cash received but not deposited into ULRI accounts. These amounts total approximately \$251,000. The investigation resulted in the termination and arrest of a finance department employee. This former employee is currently a

defendant in a criminal action in Rhode Island. The Organization filed a claim for \$100,000 (their policy limit) under a policy with Travelers Insurance. The Organization received these funds from Travelers Insurance in September 2011. SK was not engaged to perform any additional procedures related to any potential fraudulent activity other than inquiry and review of the forensic audit report issued by Braver PC.

Non-program Spending Burden

53. SK was asked to assess the Organization's monthly non-program spending burden for facilities and administrative expenses. Like many non-profit agencies, ULRI runs a number of programs which support its mission. These programs have historically been funded primarily by support from governmental agencies along with other contributions and grants from non-governmental agencies. In addition, the Organization has other sources of revenue such as program fees, rental income and fundraising income. Schedule 6 is a summary of the Statements of Activities for the fiscal years ended June 30, 2007 through June 30, 2012. The source of this information is the audited financial statements of the Organization for those years. The audit for the year ended June 30, 2013 has not yet been started and thus audited financial statements are not available for that year.
54. It can be noted on Schedule 6 that total revenues have been steadily declining and that over this six year period revenues have declined from \$5.6 million in fiscal 2007 to \$3.1 million in fiscal 2012 which is approximately a 45% decline. It can be noted that almost every category of revenue has contributed to this substantial decline. The most substantial declines from fiscal 2007 up to fiscal 2012 are support from government agencies (42%), contributions and grants (84%), program fees (84%) and fundraising (57%).
55. Although revenues have declined, program expenses have been experiencing a similar trend. Program expenses have been reduced by approximately 43% over the same time period which almost matches the revenue decline of approximately 45%. Supporting services expenses however have only declined 17% during this same period.
56. Supporting services are comprised primarily of management and general expenses and the Neighborhood Services program expenses. The Neighborhood Services program expenses are primarily the expenses for the building at 246 Prairie Avenue. It should be noted that many of the management and general expenses and some of the Neighborhood Services program expenses are allocated to programs to the extent that the programs are being run and funded. When funding for programs gets eliminated or reduced, management and general expenses and the Neighborhood Services program expenses do not necessarily get eliminated or reduced because they are substantially fixed or semi-fixed costs. For example, items like management salaries, building

insurance, utilities, building repairs, although they can be reduced somewhat, cannot be totally eliminated. Based on discussions with the CFO and review of certain payroll records, it was noted that ULRI took action by reducing all employee's pay by 10% (except for employees who were being paid at the minimum wage), including program personnel as well as management personnel.

57. Mechanisms used to fund non-program expenses like management and general expenses and building expenses are derived from other sources of revenue such as unrestricted contributions, fund raising and facility rents. Since these sources of these revenues have gone down in recent years (in addition to program revenue decreases which also cover a significant portion of management and general expenses and building expenses), the Organization has not replaced these revenue sources in an amount sufficient to balance their budget. In addition, over the last several years, administrative costs that were being reimbursed under various grants have been reduced from rates as high as 15% to rates as low as 3%.
58. As can be seen in Schedule 7, although management and general expenses have decreased significantly since 2007, the loss of programs and program funding has offset much of this decrease such that "unfunded" portion of these expenses have only decreased on a net basis by about 15%.
59. Also as can be seen in Schedule 7, Neighborhood services program expenses (primarily the expenses for the building at 246 Prairie Avenue) have not decreased since 2007. These expenses are primarily insurance, utilities and repairs and maintenance which tend to be of a fixed nature. It should be noted that the building at 246 Prairie Avenue is approximately 35,000 square feet not including the facility expansion which adds approximately 15,000 square feet to the building.
60. In addition to the building at 246 Prairie Avenue, ULRI also owns approximately nine other properties (including the Hamilton Street building noted below). Although the cost of most of these facilities are covered by rents and program revenue, there is a risk that if any of these buildings is no longer rented or used for a particular funded program, then there will be fixed costs for the Organization to absorb for that particular property.
61. In addition to the financial analysis discussed above, based on the internal management prepared (unaudited) financial statements of ULRI for the year ended June 30, 2013, total revenues in the General Fund were approximately \$2.1 million which is approximately a \$1 million decline from fiscal year ended June 30, 2012. The internal financial statements for the year ended June 30, 2013 also showed the Organization reporting a loss of approximately \$140,000 in the General Fund.
62. The management prepared budget for fiscal year ending June 30, 2014 show budgeted revenues of \$1.3 million which is a 32% decline from fiscal year ended June 30, 2013.

63. The Organization's cash flow needs must be considered in addition to the negative revenue trends, losses and the mostly fixed supporting services expenses as discussed above. Since most of the Organization's grants require the expenditure of funds before the Organization can submit for reimbursement, the Organization needs some financing, such as a line of credit to be able to expend funds before submitting for reimbursement. The Organization currently has a line of credit with a bank, however there is no availability to draw down on this line of credit since the Organization has fully utilized the existing line and the Organization is currently in default with its bank. This situation was created by several factors, including the net unrecovered embezzlement of approximately \$150,000 which has not been restored and the net shortfall to cover management and general and building expenses which are not being covered by program funds or other sources of revenue.

Other matters

64. During our work, it came to our attention that there was a fire at the Hamilton Street building in the summer of 2013. The property was totally destroyed. A claim has been filed with the Organization's insurance company. The insurance company is currently working with the Organization to gather documents needed to support the claim. It is unknown at this time as to what amount might ultimately be recovered under the insurance policy. SK interviewed the audit partner on the June 30, 2012 ULRI audit from Braver PC for any background on the matters discussed in this report. SK also interviewed the board treasurer of ULRI for any additional background on the matters discussed in this report.

65. SK also reviewed the board minutes from January 2011 through August 2013. Although there were board meetings subsequent to August 2013, there were no minutes available subsequent to the August 2013 minutes. It should be noted that the Organization's cash flow concerns were discussed at many of the board meetings from 2011 through 2013.

Restrictions

66. This report is intended solely for the use of Executive Office of the City of Providence, Rhode Island for their specific purposes and should not be used for any other purpose.

Respectively Submitted,

Sansiveri, Kimball + Co., L.L.P.

Sansiveri, Kimball & Co., L.L.P.

Date: February 13, 2014

Schedule 1

Urban League of Rhode Island, Inc.
Listing of Projected and Current Liabilities - UNAUDITED (A)

	Per the Urban League of Rhode Island, Inc. (B)	Per SK & Co.'s Analysis (C)	Notes
Accounts Payable (Health Insurance & Other Payables)	\$ 213,659	\$ 154,142	January 30, 2014 Aged A/P listing
Accounts Payable (Gas, Electric, 246 Building)	15,000	15,071	Outstanding invoices through 12/11/2013 (latest invoice)
Retainage - C&D Construction Co., Inc.		10,070	Per May 2, 2011 AIA Application for Payment
Vacation to be Accrued (2012-2014)	200,000	107,767	Actual per schedule through FY June 2010
Additional vacation to be accrued	-	37,486	Actual per schedule from FY June 2011 - Dec 2013
Executive Director's retirement obligation funding			- does not include vacation accrued or used in 2014
Payroll (8 Payroll) - Dec 2013	-	22,000	40 months owed to fund the Morgan Stanley account
Payroll taxes on accrued payroll	306,759	292,119	Includes 10 bi-weekly payroll periods through 1/25/2014
Payroll taxes on Manual payroll checks paid	-	35,054	Used 12% for approximation
Bank of America - Line of Credit		3,156	Per ADP report of untransmitted payroll
Outstanding Interest on line of credit	394,000	394,000	Balance as of 1/31/2014 - in default
Potters Mortgage Payable (Long Term)	10,000	11,231	Interest through 1/30/2014 on line of credit
City of Providence - Loan	60,360	56,127	Balance as of 1/16/2014 - not in default
Outstanding Checks	50,000	45,000	Balance outstanding as of January 31, 2014
Champlin Funds	62,000	79,409	Outstanding checks as of 12/31/2013 per bank reconciliation
	185,000	-	Legal question - November 2011 grant - \$185,550
	<u>\$ 1,496,778</u>	<u>\$ 1,262,632</u>	

(A) - These liabilities are "As Of" different dates. SK attempted to gather information on these liabilities as of the most current information available during our field work which was completed on January 31, 2014.

(B) - January 8, 2014 Listing of Projected and Current Liabilities provided to the City of Providence by the Urban League of Rhode Island

(C) - SK has performed limited procedures to substantiate the liabilities as presented by the Urban League of Rhode Island. These procedures are outlined further in the narrative report and this schedule should be read in conjunction with that report. There is no assurance that other liabilities may exist that are not reflected on this analysis or discussed in the accompanying report.

Schedule 2

Urban League of Rhode Island, Inc.
Schedule of Payroll Weeks and Delinquent Payrolls

<u>Payroll Dates</u>		<u>Urban League</u>	<u>ADP</u>	<u>Date</u>	<u>Date</u>	<u>Days</u>
<u>Beg</u>	<u>End</u>	<u>Payroll Week</u>	<u>Payroll Week</u>	<u>Paid</u>	<u>Due</u>	<u>Late</u>
2/10/2013	2/23/2013	9	9	3/5/2013	3/1/2013	4
2/24/2013	3/9/2013	11	11	3/15/2013	3/15/2013	0
3/10/2013	3/23/2013	13	14	4/2/2013	3/29/2013	4
3/24/2013	4/6/2013	15	16	4/18/2013	4/12/2013	6
4/7/2013	4/20/2013	17	18	5/1/2013	4/26/2013	5
4/21/2013	5/4/2013	19	20	5/16/2013	5/10/2013	6
5/5/2013	5/18/2013	21	23	6/6/2013	5/24/2013	13
5/19/2013	6/1/2013	23	26	6/29/2013	6/7/2013	22
6/2/2013	6/15/2013	25	30	7/26/2013	6/21/2013	35
6/16/2013	6/29/2013	27	31	8/2/2013	7/5/2013	28
6/30/2013	7/13/2013	29	35	8/27/2013	7/19/2013	39
7/14/2013	7/27/2013	31	36	9/6/2013	8/2/2013	35
7/28/2013	8/10/2013	33	40	9/30/2013	8/16/2013	45
8/11/2013	8/24/2013	35	43	10/25/2013	8/30/2013	56
8/25/2013	9/7/2013	37	47	11/22/2013	9/13/2013	70
<u>Unpaid Payrolls:</u>						
9/8/2013	9/21/2013	39				
9/22/2013	10/5/2013	41				
10/6/2013	10/19/2013	43				
10/20/2013	11/2/2013	45				
11/3/2013	11/16/2013	47				
11/17/2013	11/30/2013	49				
12/1/2013	12/14/2013	51				
12/15/2013	12/28/2013	1				
12/29/2013	1/11/2014	3				
1/12/2014	1/25/2014	5				

Schedule 3

Urban League of Rhode Island, Inc.
Schedule of Payroll and Vacation Liabilities

Employee	Department	Accrued Payroll (A)	Accrued Vacation (B)	Total Amount Owed
Thelma Sowell	Administration	\$ 5,607.00	\$ -	\$ 5,607.00
Dennis Langley	Administration	30,769.20	85,165.68	115,934.88
Steve Muchiri	Administration	20,769.20	3,843.93	24,613.13
Leslie Thompson	Administration	19,038.40	10,285.85	29,324.25
MJ Daly	Administration	16,615.40	7,708.63	24,324.03
Elsa Shum	Administration	10,384.70	1,038.75	11,423.45
Everin Perez	Minority Adoption	12,461.58	4,015.05	16,476.63
Lisa Jackson	Minority Adoption	288.67	288.68	577.35
Jesse Jordan	Safe Haven	8,653.85	12,191.44	20,845.29
Michelle Langley	Safe Haven	4,541.53	221.60	4,763.13
Sheila Turner	Safe Haven	4,944.48	1,153.60	6,098.08
Alice Miranda	Safe Haven	4,307.65	1,292.40	5,600.05
Vera Mignot	Safe Haven	3,184.00	-	3,184.00
Michelle Philogene	Safe Haven	4,182.20	167.36	4,349.56
Maria-Rosa Gomes Da Silva	Safe Haven	3,980.80	557.20	4,538.00
Juan Fernandez	Safe Haven	9,960.00	-	9,960.00
Alfred Whitehead	Safe Haven	1,592.00	-	1,592.00
Carlos Braz	Safe Haven	2,327.16	-	2,327.16
Eva Erius	Safe Haven	1,685.04	-	1,685.04
Latrice Gorham	Safe Haven	1,568.00	-	1,568.00
Margaret Padula	Safe Haven	2,635.00	-	2,635.00
Debras Frantz	Safe Haven	1,510.65	-	1,510.65
Hyacinth Wade	Basic Center	6,542.30	-	6,542.30
Elvira Walters	Basic Center	3,544.62	-	3,544.62
Ludivina Lopez Gonzalez	Basic Center	-	-	-
Joan Barros	Basic Center	1,372.50	-	1,372.50
Janice Mann	Basic Center	2,397.60	-	2,397.60
Mary Kinyua	Basic Center	4,973.40	-	4,973.40
Icilda Ranglin	Basic Center	3,175.20	-	3,175.20
Norma Williams	Basic Center	2,818.80	-	2,818.80
Kenya Fullen	Basic Center/Youth Success	8,089.32	-	8,089.32
Wallace Antonette	Basic Center	923.40	-	923.40
Sylvia Valentin	Shelter	-	-	-
Bernard Walters	Shelter	12,807.70	2,049.28	14,856.98
Bierrami Dunkley	Shelter	12,692.30	1,522.80	14,215.10
Luis Aponte	Shelter	15,576.90	13,750.88	29,327.78
David Carr	Shelter	7,961.29	-	7,961.29
Nevil Rowe	Shelter	2,997.00	-	2,997.00
Jose Sierre	Shelter	3,119.00	-	3,119.00
James Connelly	Shelter	-	-	-
Gerald White	Shelter	2,959.69	-	2,959.69
Octavio Marte	Shelter	4,706.10	-	4,706.10
Fredy Gill	Shelter	1,057.05	-	1,057.05
Cecilia Nelson	Shelter	5,637.60	-	5,637.60
Anita Hanson	Shelter	1,533.00	-	1,533.00
Sara Francis	Shelter	496.00	-	496.00
Emertine Williams	Shelter	5,564.70	-	5,564.70
Belinda Francis	Youth Success	10,166.67	-	10,166.67
		<u>\$ 292,118.65</u>	<u>\$ 145,253.11</u>	<u>\$ 437,371.76</u>

(A) - Accrued Payroll has been calculated through January 25, 2014

(B) - Accrued vacation has been calculated through December 31, 2013

Schedule 4

Urban League of Rhode Island, Inc. Calculation of Dennis Langley Retirement Benefits (A)

Year	Compensation		Benefit	
	By Year	6% Retirement Benefit	6% Employer Match	
1997 Total	\$ 48,000.00	\$ 2,880.00	\$ 2,880.00	
1998 Total	72,000.00	4,320.00	4,320.00	
1999 Total	72,000.00	4,320.00	4,320.00	
2000 Total	77,000.00	4,620.00	4,620.00	
2001 Total	82,000.00	4,920.00	4,920.00	
2002 Total	82,000.00	4,920.00	4,920.00	
2003 Total	82,000.00	4,920.00	4,920.00	
2004 Total	86,982.43	5,218.95	5,218.95	
2005 Total	105,000.00	6,300.00	6,300.00	
2006 Total	110,000.00	6,600.00	6,600.00	
2007 Total	110,000.00	6,600.00	6,600.00	
2008 Total	110,000.00	6,600.00	6,600.00	
2009 Total	110,000.00	6,600.00	6,600.00	
2010 Total	110,000.00	6,600.00	6,600.00	
2011 Total	110,000.00	6,600.00	6,600.00	
2012 Total	87,258.06	5,235.48	5,235.48	
2013 Total	80,000.00	4,800.00	4,800.00	
2014 Total	6,666.67	400.00	400.00	
Grand Total	\$ 1,540,907.16	\$ 92,454.43	\$ 92,454.43	

The following is a summary of Dennis Langley's Compensation History from 5/1/1997 for purposes of calculating his retirement benefit:

Effective 5/1/97 - \$72,000 Salary - (Per 4/24/97 Letter)

Effective 7/1/2000 - Salary Increase to \$82,000 (Per 6/20/00 Letter)

Effective 2/23/04 - Salary Increased to \$87,838 (Per Dennis Langley Employee Folder Jacket)

Effective 1/1/05 - Salary Increased to \$100,000 (Per 1/1/05 Payroll Status Change)

Effective 7/1/05 - Salary Increased to \$110,000 (Per 2/5/07 Payroll Status Change - Retro to 7/1/05)

Effective 3/29/12 - Salary Decreased to \$80,000 (Per 3/29/12 Payroll Status Change)

(A) - This calculation was performed by SK based on a retirement benefit as outlined in an unsigned offer letter in Mr. Langley's personnel file. This has not been corroborated with any plan document, if such plan document exists.

Schedule 5

South Providence Development Corp.
Listing of Projected and Current Liabilities - UNAUDITED (A)

	Per the Urban League of Rhode Island, Inc. (B)	Per SK & Co.'s Analysis (C)	Notes
Accounts Payable (National Grid, Gas & Others)	\$ 53,535	\$ 32,968	January 29, 2014 A/P listing
Note Payable PEDC (Prov. Economic Development Corp)	305,866	309,744	Per 12/22/2013 statement
Cleanceape Guarantee Shortfall Obligation to PEDC	-	58,131	Balance as of March 6, 2012 - per Forbearance Agreement
Interest on PEDC Guarantee Shortfall Obligation	-	3,488	Estimate of unpaid interest at 3% since 2/1/2012 through 1/31/2014
Fixing and Moving Expenses to Gordon Ave - PROJECTED	250,000	-	No liability at present - this is a projected number
Line of Credit - Bank of America	74,000	78,041	Per January 19, 2013 statement from Convergent Outsourcing, Inc.
Interest (ESTIMATE)	8,500	-	- this loan is with a debt collector
Keith Fernandez (Property Tax Redemption - Gordon St. Property)	35,000	34,525	Promissory Note dated 8/14/2013
Interest (ESTIMATE)	5,000	3,970	Interest calculated through January 14, 2014 plus maturity extension fee
Taxes 2011 - Redemption - 17 - 21 Gordon Avenue	12,000	12,525	Per Tax Sale Notice from the City of Providence
Interest (ESTIMATE)	6,500	1,500	Estimate of interest for 8 months through January 2014
	<u>\$ 750,401</u>	<u>\$ 534,892</u>	

(A) - These liabilities are "As Of" different dates. SK attempted to gather information on these liabilities as of the most current information available during our field work which was completed on January 31, 2014.

(B) - January 8, 2014 Listing of Projected and Current Liabilities provided to the City of Providence by the Urban League of Rhode Island

(C) - SK has performed limited procedures to substantiate the liabilities as presented by the Urban League of Rhode Island. These procedures are outlined further in the narrative report and this schedule should be read in conjunction with that report.
 There is no assurance that other liabilities may exist that are not reflected on this analysis or discussed in the accompanying report.

Schedule 6

Urban League of Rhode Island, Inc.
Statements of Activities - as of June 30 (A)

	2007	2008	2009	2010	2011	2012
ASSETS						
Changes in unrestricted net assets:						
Public support and revenue:						
United Way allocation	\$ 29,179	\$ -	\$ -	\$ -	\$ -	\$ -
Support from governmental agencies	4,592,760	3,834,225	4,168,966	3,472,183	2,751,038	2,686,170
Contributions and grants	233,931	1,333,650	187,605	193,211	490,979	37,757
Program fees	410,546	403,762	350,213	200,104	129,602	65,697
Membership income	7,265	4,544	3,828	3,635	3,189	2,117
Interest income	120	49	47	136	10	8
Neighborhood facility rents	232,789	351,454	382,559	285,099	274,542	216,846
Administrative fees	2,916	57,091	48,179	20,632	47,582	11,663
Fund Raising	109,279	97,302	57,048	31,072	66,896	46,721
Miscellaneous income	9,762	8,554	1,464	10,148	51,346	12,357
Total unrestricted public support and revenue	5,628,547	6,090,631	5,199,909	4,216,220	3,815,184	3,079,336
Net assets released from restrictions:						
Satisfied by use of funds for scholarships	17,075	16,144	142,444	60,361	18,850	39,623
Total unrestricted public support, revenue and other	5,645,622	6,106,775	5,342,353	4,276,581	3,834,034	3,118,959
Expenses:						
Program services:						
Case Management	283,347	209,532	201,710	189,534	171,006	117,021
Advocacy and Public Policy	197,013	124,465	100,602	67,311	89,443	79,756
Youth Program	782,810	727,022	976,144	717,305	613,232	676,548
School Health Education	286,609	153,959				
Alternative Schools	110,712	113,106	121,939	80,710	56,855	76,155
Education and Training	155,335	227,582	594,602	410,060	105,165	404,076
HIV Education and Fresh Start	583,747	629,910	707,419	758,081	457,778	238,760
Shelters	865,628	458,080	651,427	357,795	355,002	278,062
Rhode Island Families for Children	425,746	371,873	152,275	144,912	142,242	143,235
Safe Haven	918,650	825,569	581,761	546,717	516,757	454,408
After School Care	265,809	215,748	333,204	292,934	345,535	294,457
Scholarships	17,075	16,144	16,050	11,400	18,630	15,873
Supporting services:						
Neighborhood services	197,527	357,139	365,828	338,095	290,239	301,985
Management and general	615,302	656,981	623,348	594,148	404,132	368,902
Young Professionals	16,845	34,690	30,861	14,671	21,276	24,362
Urban League Guild	14,043	10,827	5,034	7,761	4,672	6,266
	5,736,198	5,132,627	5,462,204	4,531,434	3,591,964	3,479,866
Increase (decrease) in unrestricted net assets	(90,576)	974,148	(119,851)	(254,853)	242,070	(360,907)
Temporarily restricted net assets:						
Contributions restricted for scholarships	17,215	17,993	17,358	14,668	19,709	3,206
Champlin grant funds	50,000	50,000	75,388	-	-	185,550
Net assets released from restriction	(17,075)	(16,144)	(142,444)	(60,361)	(18,850)	(39,623)
Increase in temporarily restricted net assets	50,140	51,849	(49,698)	(45,693)	859	149,133
Increase (decrease) in net assets	\$ (40,436)	\$ 1,025,997	\$ (169,549)	\$ (300,546)	\$ 242,929	\$ (211,774)

(A) - This information was obtained from audited financial statements of ULRI for the years ended June 30, 2007 through June 30, 2012.
These audits were performed by Braver PC for all of the years shown above.

Schedule 7

Urban League of Rhode Island, Inc.
Supporting Services Expenses (A)

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>
Management and general expenses						
Management and general expenses allocated to programs	\$ 615,302	\$ 656,981	\$ 623,348	\$ 594,148	\$ 404,132	\$ 368,902
Management and general expenses not allocated to programs	449,865	467,684	467,279	376,140	261,781	228,827
	<u>\$ 165,437</u>	<u>\$ 189,297</u>	<u>\$ 156,069</u>	<u>\$ 218,008</u>	<u>\$ 142,351</u>	<u>\$ 140,075</u>
Neighborhood Services program - not including salaries or depreciation						
	<u>\$ 121,360</u>	<u>\$ 143,989</u>	<u>\$ 116,364</u>	<u>\$ 121,514</u>	<u>\$ 91,991</u>	<u>\$ 121,940</u>

(A) - This information was obtained from audited financial statements of ULRI for the years ended June 30, 2007 through June 30, 2012.
These audits were performed by Braver PC for all of the years shown above.

SUPPLEMENTARY INFORMATION

THE URBAN LEAGUE OF RHODE ISLAND
STATEMENT OF FUNCTIONAL EXPENSES
 Year Ended June 30, 2012

	Program Expenses										Total Program
	Case Management	Advocacy and Public Policy	Youth Program	Alternative School	Education and Training	Community Health Services	Shelters	RI Families for Children	Safe Haven	After School Care	
Salaries	\$ 48,232	\$ 62,181	\$ 436,282	\$ 56,206	\$ 168,491	\$ 154,983	\$ 176,242	\$ 91,952	\$ 282,289	\$ 174,460	\$ 1,651,318
Payroll taxes and employee benefits	23,335	12,703	98,004	13,539	20,646	50,158	36,868	33,391	83,184	62,967	434,795
Total salaries and related expenses	71,567	74,884	534,286	69,745	189,137	205,141	213,110	125,343	365,473	237,427	2,086,113
Insurance	-	-	-	-	-	-	-	-	-	-	-
Bonding	-	-	-	-	-	-	-	-	-	-	-
Professional fees and contract services	4,325	38	4,817	1,876	170,602	22,459	3,134	8,501	583	4,846	222,351
Office supplies	1,058	995	4,442	622	948	930	280	973	570	805	11,623
Supplies	483	-	4,414	312	3,702	261	7,274	50	5,623	4,436	26,555
Food	-	-	4,439	62	53	36	28,063	652	28,559	18,701	80,365
Advertising and public relations	-	-	518	348	-	-	-	-	1,214	-	11,659
Stipends	-	-	18,526	-	34,173	-	50	-	-	-	52,749
Telephone	-	-	15,721	1,350	511	2,539	1,579	3,565	2,773	-	35,742
Rent	5,784	1,920	-	-	-	-	-	-	-	-	-
Utilities	-	-	6,780	-	-	-	-	-	-	-	65,734
Miscellaneous expense	16,858	1,697	7,786	461	202	-	11,513	-	13,265	15,621	19,300
Assistance to individuals	6,029	-	-	-	-	-	200	1,112	1,095	2,232	83
Scholarships	100	-	-	-	-	-	-	-	-	-	100
Postage	-	-	-	-	-	-	-	-	-	-	-
Gas	142	35	284	27	40	145	34	317	83	23	14,640
Equipment rental, repairs and maintenance	-	-	-	-	-	-	-	-	-	-	1,130
Travel	3,493	99	15,171	822	725	1,524	2,258	1,800	12,407	5,114	12,407
Printing	-	-	10,409	-	800	23	2,500	727	18,532	4,312	49,538
Conferences and meetings	-	-	-	-	-	-	-	-	2,546	-	21,317
Organization and membership dues	5,085	88	3,297	530	2,665	530	340	195	190	265	13,185
Bank service charges	-	-	65	-	-	-	258	-	130	675	1,128
Property taxes	239	-	-	-	-	-	-	-	-	-	239
Interest expense	-	-	-	-	-	-	-	-	-	-	-
Totals before depreciation, allocation of management and general and occupancy	115,163	79,756	640,016	76,155	404,076	233,588	270,593	143,235	452,843	294,457	2,725,755
Occupancy charges	1,858	-	36,532	-	-	5,172	7,469	-	-	-	51,031
Depreciation Expense	-	-	-	-	-	-	-	-	1,565	-	1,565
Totals before management and general	117,021	79,756	676,548	76,155	404,076	238,760	278,062	143,235	454,408	294,457	2,778,351
Management and general	390	2,149	89,545	12,000	24,473	37,946	-	15,779	10,745	40,800	228,527
Total expenses	\$ 117,411	\$ 81,905	\$ 766,093	\$ 88,155	\$ 428,549	\$ 271,706	\$ 278,062	\$ 159,014	\$ 465,153	\$ 335,257	\$ 3,007,178

(CONTINUED)

THE URBAN LEAGUE OF RHODE ISLAND
STATEMENT OF FUNCTIONAL EXPENSES
Year Ended June 30, 2012

	Supporting Services					Total All Expenses
	Management and General	Total General Fund Expenses	Neighborhood Services Program	Young Professionals	Urban League Guild	
Salaries	\$ 246,867	\$ 1,898,185	\$ 2,587	\$ -	\$ -	\$ 1,900,772
Payroll taxes and employee benefits	52,251	487,046	474	-	-	487,520
Total salaries and related expenses	299,118	2,385,231	3,061	-	-	2,388,292
Insurance	-	-	30,342	-	-	30,342
Bonding	891	891	-	-	-	891
Professional fees and contract services	35,402	257,733	9,204	1,119	-	268,056
Office supplies	893	12,516	-	1,261	-	13,777
Supplies	-	26,555	2,321	-	-	28,876
Food	870	81,235	-	1,431	-	82,666
Advertising and public relations	835	12,494	-	-	-	12,494
Supends	52,749	-	-	-	-	52,749
Telephone	3,189	38,931	-	-	-	38,931
Rent	-	-	-	-	-	-
Utilities	-	65,734	63,069	-	-	128,803
Miscellaneous expense	-	19,200	479	9,270	3,619	32,568
Assistance to individuals	-	100	-	-	-	100
Scholarships	-	14,640	-	-	2,147	16,787
Postage	1,227	2,357	-	-	50	2,407
Gas	-	12,407	-	-	-	12,407
Equipment rental, repairs and maintenance	2,294	51,832	12,359	-	-	64,191
Travel	1,832	23,149	-	-	-	23,423
Printing	-	-	-	274	-	274
Conferences and meetings	2,769	15,954	-	7,780	-	23,734
Organization and membership dues	-	1,128	-	2,429	450	4,007
Bank service charges	4,197	4,436	-	38	-	4,474
Property taxes	186	186	-	-	-	186
Interest expense	15,199	15,199	4,166	-	-	19,365
Totals before depreciation, allocation of management and general and occupancy	368,902	3,094,657	125,001	24,362	6,266	3,250,286
Occupancy charges	-	51,031	-	-	-	51,031
Depreciation Expense	-	1,565	176,984	-	-	178,549
Totals before management and general	368,902	3,147,253	301,985	24,362	6,266	3,479,866
Management and general	(228,827)	(42,600)	42,600	-	-	-
Total expenses	\$ 140,075	\$ 3,104,653	\$ 344,585	\$ 24,362	\$ 6,266	\$ 3,479,866

(CONCLUDED)

THE URBAN LEAGUE OF RHODE ISLAND
STATEMENT OF FUNCTIONAL EXPENSES
Year Ended June 30, 2011

	Program Expenses										Total Program
	Case Management	Advocacy and Public Policy	Youth Program	Alternative School	Education and Training	Community Health Services	Shelters	RI Families for Children	Safe Haven	After School Care	
Salaries	\$ 82,311	\$ 71,213	\$ 373,961	\$ 40,920	\$ 60,083	\$ 270,570	\$ 184,897	\$ 84,224	\$ 293,574	\$ 212,486	\$ 1,674,239
Payroll taxes and employee benefits	43,185	11,563	111,544	10,112	2,651	73,316	39,963	34,911	105,047	72,209	504,501
Total salaries and related expenses	125,496	82,776	485,505	51,032	62,734	343,886	224,860	119,135	398,621	284,695	2,178,740
Insurance	144	124	549	-	72	776	-	446	570	291	2,972
Bonding	-	-	-	-	-	-	-	-	-	-	-
Professional fees and contract services	555	-	8,193	1,276	5,726	64,457	2,000	16,718	1,875	9,352	110,652
Office supplies	1,595	386	4,424	540	1,954	2,828	361	575	1,277	389	14,329
Supplies	-	-	3,318	733	2,234	105	7,389	-	5,658	5,359	24,796
Food	224	-	5,460	229	164	-	43,678	414	31,326	16,765	98,260
Advertising and public relations	-	363	4,885	669	697	7,831	-	-	642	285	15,372
Stipends	-	-	7,225	-	31,490	1,924	200	-	-	2,200	43,039
Telephone	7,444	1,860	9,850	900	-	5,125	2,588	1,400	5,821	1,071	36,059
Rent	-	-	-	-	-	-	-	-	-	-	-
Utilities	14,405	2,504	10,885	-	-	-	13,313	-	15,340	16,976	73,423
Miscellaneous expense	5,392	847	11,059	1,421	25	(2,170)	1,426	50	3,710	2,851	25,391
Assistance to individuals	996	-	-	-	-	16,765	-	-	-	-	18,861
Scholarships	-	-	-	-	-	-	-	-	-	-	16,250
Postage	218	22	548	30	20	342	10	336	200	93	1,819
Gas	-	-	-	-	-	-	-	-	16,480	-	16,480
Equipment rental, repairs and maintenance	5,949	204	15,323	-	-	4,915	5,630	-	20,217	2,372	54,630
Travel	12	23	5,450	-	-	1,565	165	984	5,925	2,017	16,141
Printing	-	-	-	-	-	280	-	595	-	-	875
Publications	-	-	80	-	-	149	-	-	-	-	229
Conferences and meetings	8,486	334	2,243	-	49	2,104	-	489	-	154	13,859
Organization and membership dues	-	-	215	25	-	-	-	1,100	130	665	2,225
Bank service charges	90	-	-	-	-	-	-	-	-	-	-
Property taxes	-	-	-	-	-	-	-	-	-	-	-
Bid/del expense	-	-	-	-	-	-	-	-	-	-	-
Interest expense	-	-	-	-	-	-	-	-	-	-	-
Totals before depreciation, allocation of management and general and occupancy charges	171,006	89,443	575,212	56,855	105,165	450,882	301,620	142,242	507,812	345,535	2,764,402
Occupancy charges	-	-	38,020	-	-	6,896	53,382	-	-	-	98,298
Depreciation Expense	-	-	-	-	-	-	-	-	8,945	-	8,945
Totals before management and general	171,006	89,443	613,232	56,855	105,165	457,778	355,002	142,242	516,757	345,535	2,871,645
Management and general	481	5,332	91,698	10,000	2,485	42,887	40,895	15,779	12,224	40,000	261,781
Total expenses	\$ 171,487	\$ 94,775	\$ 704,930	\$ 66,855	\$ 107,650	\$ 500,665	\$ 395,897	\$ 158,021	\$ 528,981	\$ 385,535	\$ 3,133,426

(CONTINUED)

THE URBAN LEAGUE OF RHODE ISLAND
STATEMENT OF FUNCTIONAL EXPENSES
Year Ended June 30, 2011

	Supporting Services					Total All Expenses
	Management and General	Total General Fund Expenses	Neighborhood Services Program	Young Professionals	Urban League Guild	
Salaries	\$ 249,366	\$ 1,923,605	\$ 6,828	\$ -	\$ -	\$ 1,930,433
Payroll taxes and employee benefits	45,294	549,795	797	-	-	550,592
Total salaries and related expenses	294,660	2,473,400	7,625	-	-	2,481,025
Insurance	825	3,797	18,119	-	-	21,916
Bonding	912	912	-	-	-	912
Professional fees and contract services	35,500	146,152	11,230	500	-	157,882
Office supplies	3,614	17,943	-	34	-	17,977
Supplies	456	25,252	1,184	-	-	26,436
Food	1,533	99,793	-	1,660	-	101,453
Advertising and public relations	1,544	16,916	-	-	-	16,916
Stipends	-	43,039	-	-	-	43,039
Telephone	3,775	39,834	-	-	-	39,834
Rent	-	-	-	-	-	-
Utilities	1,172	74,595	40,281	-	-	114,876
Miscellaneous expense	1,100	26,491	1,326	8,450	3,132	39,399
Assistance to individuals	-	18,861	-	-	-	18,861
Scholarships	-	16,250	-	-	1,090	17,340
Postage	437	2,256	-	148	-	2,404
Gas	-	16,480	-	-	-	16,480
Equipment rental, repairs and maintenance	2,806	57,436	11,768	-	-	69,204
Travel	4,333	20,474	-	-	-	20,474
Printing	-	875	-	482	-	1,357
Publications	775	1,004	-	-	-	1,004
Conferences and meetings	16,391	30,250	-	9,541	-	39,791
Organization and membership dues	16,157	18,382	-	350	450	19,182
Bank service charges	2,705	2,705	-	111	-	2,816
Property taxes	-	-	-	-	-	-
Bad debt expense	-	-	-	-	-	-
Interest expense	15,437	15,437	8,083	-	-	23,520
Totals before depreciation, allocation of management and general and occupancy	404,132	3,168,534	99,616	21,276	4,672	3,294,098
Occupancy charges	-	98,298	-	-	-	98,298
Depreciation Expense	-	8,945	190,623	-	-	199,568
Totals before management and general	404,132	3,275,777	290,239	21,276	4,672	3,591,964
Management and general	(261,781)	(42,600)	42,600	-	-	-
Total expenses	\$ 142,351	\$ 3,233,177	\$ 332,839	\$ 21,276	\$ 4,672	\$ 3,591,964

(CONCLUDED)

URBAN LEAGUE OF RHODE ISLAND, INC.

Schedule of Expenses for Rhode Island Families for Children
YEAR ENDED JUNE 30, 2012

	<u>DCYF Funded</u>	<u>Other Funded</u>	<u>Total Rhode Island Families for Children</u>
Administrative salaries	\$ 50,000		\$ 50,000
Staff personnel salaries	46,500	\$ 18,000	64,500
Consultants	5,000		5,000
Fringe benefits	25,090		25,090
Administrative and general	22,910		22,910
Total Program	\$ 149,500	\$ 18,000	\$ 167,500

Administrative and general expenses are distributed to various programs based on total direct program expenses.



**REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON
COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS
PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

To the Board of Directors of
Urban League of Rhode Island, Inc.

We have audited the financial statements of the Urban League of Rhode Island, Inc. (a nonprofit organization) as of and for the year ended June 30, 2012, and have issued our report thereon dated April 15, 2013. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by Comptroller General of the United States.

Internal Control Over Financial Reporting

Management of Urban League of Rhode Island, Inc. is responsible for establishing and maintaining effective internal control over financial reporting. In planning and performing our audit, we considered the Urban League of Rhode Island, Inc.'s internal control over financial reporting as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Urban League of Rhode Island Inc.'s internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of the Urban League of Rhode Island, Inc.'s internal control over financial reporting.

Our consideration of internal control over financial reporting was for the limited purpose described in the preceding paragraph and was not designed to identify all deficiencies in internal control over financial reporting that might be significant deficiencies, or material weaknesses and therefore, there can be no assurance that all deficiencies, significant deficiencies, or material weaknesses have been identified. However, as described in the accompanying schedule of findings and questioned costs, we identified certain deficiencies in internal control over financial reporting that we consider to be material weaknesses.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Urban League of Rhode Island Inc.'s financial statements will not be prevented, or detected and corrected on a timely basis. We consider the deficiencies described in the accompanying schedule of findings and questioned costs (noted as Items 2012-1 and 2012-2) to be material weaknesses.



Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Urban League of Rhode Island, Inc.'s financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Urban League of Rhode Island, Inc.'s responses to the findings identified in our audit are described in the accompanying schedule of findings and questioned costs. We did not audit Urban League of Rhode Island, Inc.'s responses and, accordingly, we express no opinion on them.

This report is intended solely for the information and use of the Board of Directors, management, others within the organization and federal awarding agencies and pass-through entities and is not intended to be and should not be used by anyone other than these specified parties.

A handwritten signature in black ink that reads "Braver PC". The signature is written in a cursive, flowing style.

Providence, Rhode Island
April 15, 2013



**REPORT OF INDEPENDENT AUDITORS ON COMPLIANCE WITH REQUIREMENTS
THAT COULD HAVE A DIRECT AND MATERIAL EFFECT ON EACH MAJOR PROGRAM AND ON
INTERNAL CONTROL OVER COMPLIANCE IN ACCORDANCE WITH OMB CIRCULAR A-133**

To the Board of Directors of
Urban League of Rhode Island, Inc.

Compliance

We have audited the Urban League of Rhode Island, Inc.'s (a non-profit Corporation) compliance with the types of compliance requirements described in the *OMB Circular A-133 Compliance Supplement* that could have a direct and material effect on each of Urban League of Rhode Island, Inc.'s major federal programs for the year ended June 30, 2012. Urban League of Rhode Island, Inc.'s major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs. Compliance with the requirements of laws, regulations, contracts, and grants applicable to each of its major federal programs is the responsibility of the Urban League of Rhode Island, Inc.'s management. Our responsibility is to express an opinion on the Urban League of Rhode Island, Inc.'s compliance based on our audit.

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America; and OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Those standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the Urban League of Rhode Island, Inc.'s compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe that our audit provides a reasonable basis for our opinion. Our audit does not provide a legal determination of the Urban League of Rhode Island, Inc.'s compliance with those requirements.

In our opinion, Urban League of Rhode Island, Inc. complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2012.



Internal Control Over Compliance

Management of the Urban League of Rhode Island, Inc. is responsible for establishing and maintaining effective internal control over compliance with the requirements of laws, regulations, contracts, and grants applicable to federal programs. In planning and performing our audit, we considered the Urban League of Rhode Island, Inc.'s internal control over compliance with the requirements that could have a direct and material effect on a major federal program to determine the auditing procedures for the purpose of expressing our opinion on compliance and to test and report on internal control over compliance in accordance with OMB Circular A-133, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Urban League of Rhode Island, Inc.'s internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that a material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be deficiencies, significant deficiencies, or material weaknesses. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above.

This report is intended solely for the information and use of the Board of Directors, management, others within the organization, and federal awarding agencies and pass-through entities and is not intended to be and should not be used by anyone other than these specified parties.



Providence, Rhode Island
April 15, 2013

URBAN LEAGUE OF RHODE ISLAND, INC.
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
FOR THE YEAR ENDED JUNE 30, 2012

<u>Federal Grantor</u> <u>Pass-Through Grantor</u> <u>Program Title</u>	<u>Federal</u> <u>CFDA</u> <u>Number</u>	<u>Award/</u> <u>Pass-Through</u> <u>Grantor's</u> <u>Number</u>	<u>Expenditures</u>
U.S. Department of Housing and Urban Development			
Direct programs			
Case Management	14.169	HC100321-173	\$ 35,000
Passed Through Rhode Island Housing			
Supportive Housing Program - Safe Haven I	14.235*	RI0043B1T001004	183,908
Supportive Housing Program - Safe Haven II	14.235*	RI0044B1T001003	195,832
Passed Through Providence Community Action			
Case Management	14.213	CDBG 699-35-JJ	6,688
Passed Through Providence Department of Planning and Development			
Emergency Shelter Grant	14.231	CDBG 811-37	13,137
Total U.S. Department of Housing and Urban Development			<u>434,565</u>
U.S. Department of Labor			
Passed Through Providence School Department			
Alternative Education / Bridge School	17.274	75535	83,085
Total U.S. Department of Labor			<u>83,085</u>
U.S. Department of Health and Human Services			
Passed Through Rhode Island Department of Health and Human Services			
Tobacco Control Policy Change Demonstration Grant	93.283	3014004-1	8,784
Physical Activity Nutrition & Tobacco (PANT) Control Initiatives - ARRA	93.723	3254548	40,027
Shelters	93.667*	CHF12-ULRIM/W-6114	253,930
Transitional Living for Homeless Youth	93.550	01CX0580/02	197,817
Basic Center Grant	93.623	90CY2417/01	196,520
Communities Putting Prevention to Work - ARRA	93.724	1U58DP002396-01	50,665
Passed Through RI Department of Children, Youth and Families			
Community-Based Child Abuse Prevention Grant	93.590	HIPPY	45,031
Promoting Safe and Stable Families	93.556*	IV-B 14	134,842
Total U.S. Department of Health and Human Services			<u>927,616</u>
U.S. Department of Homeland Security			
Passed Through United Way			
Emergency Food and Shelter National Board Program	97.024	LRO-735400-040	8,599
Total Federal Expenditures			<u>\$ 1,453,865</u>

* Denotes a major program

URBAN LEAGUE OF RHODE ISLAND, INC.**NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS
YEAR ENDED JUNE 30, 2012**

1. GENERAL

The accompanying schedule of expenditures of federal awards includes the federal grant activity of Urban League of Rhode Island, Inc. and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in the preparation of the basic financial statements.

2. DETERMINATION OF MAJOR PROGRAMS

The determination of major federal awards programs was based upon the overall level of expenditures for all federal programs for the Urban League of Rhode Island, Inc. As such, the threshold for determining Type A and Type B programs are defined as those with program expenditures greater than \$300,000 or 3 percent of total expenditures when the total expenditures are over \$10,000,000. The federal expenditures incurred related to funding received under CFDA #14.235, #93.556 and #93.667 have been tested as major program expenditures for the year ended June 30, 2012.

URBAN LEAGUE OF RHODE ISLAND, INC.**SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2012****A. SUMMARY OF AUDIT RESULTS**

1. The Report of Independent Auditors expressed an unqualified opinion on the financial statements of the Urban League of Rhode Island, Inc.
2. Two deficiencies in internal control over financial reporting have been identified and are described in Part B below as Items 2012-1 and 2012-2. Both of these deficiencies are considered to be material weaknesses.
3. No instances of noncompliance material to the financial statements of the Urban League of Rhode Island, Inc. were disclosed during the audit.
4. No material weaknesses or significant deficiencies in internal control over compliance with requirements applicable to major federal programs were identified.
5. The Report of Independent Auditors on compliance for the major federal award programs for the Urban League of Rhode Island, Inc. expresses an unqualified opinion.
6. Audit findings relative to the major federal awards program of Urban League of Rhode Island, Inc. are reported in Part C of this schedule.
7. The programs tested as a major program were:

Safe Haven I & II	CFDA #14.235
Promoting Safe and Stable Families	CFDA #93.556
Social Services Block Grant (Shelters)	CFDA #93.667
8. The threshold for distinguishing Type A and B programs was \$300,000.
9. The Urban League of Rhode Island, Inc. was not determined to be a low-risk auditee.

B. FINDINGS – RELATED TO AUDIT OF FINANCIAL STATEMENTS**CURRENT YEAR FINDINGS:****2012-1: MAINTENANCE OF GENERAL LEDGER**

During the fiscal year ended June 30, 2012 we noted control weaknesses over the reviewing and maintenance of the general ledger accounting records. At the commencement of our audit field work management provided trial balances maintained by the Organization. Upon initial review of these trial balances we noted instances where the fund balance was not in agreement with the balance reported as of the end of the previous fiscal year. In addition, as a result of our audit procedures we proposed several material journal entries to management. These proposed entries have been approved and recorded by management. The material audit adjustments and the lack of reconciled fund balance is an indication of a deficiency in controls and procedures over the maintenance and review of the general ledger accounting records.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2012

B. FINDINGS – RELATED TO AUDIT OF FINANCIAL STATEMENTS (CONTINUED)

CURRENT YEAR FINDINGS (Continued):

2012-1: MAINTENANCE OF GENERAL LEDGER (Continued)

Recommendation:

We recommend that management develop and implement a detailed set of internal control policies and procedures which will include provisions requiring the general ledger accounting records to be reviewed on a monthly basis by qualified personnel. When reviewing the general ledger trial balance reports management should ensure that all account balances are in agreement with subsidiary ledgers, records, and applicable source documents. Every effort should be made to ensure that internal financial records are complete and accurate. Annual audits should not result in journal entries which materially alter the financial results reported by management.

Management's Response

Internal financial records will continue to be reviewed on a monthly basis to ensure they are complete and accurate. Provisions for accrued expenses and deferred revenue will be made to accurately reflect the end of year financial position.

2012-2: FEDERAL GRANTS / SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS (SEFA)

During our audit of the Organization's Schedule of Expenditures of Federal Awards (SEFA), we noted that the schedule did not accurately report the total expenditures of federal funds for the fiscal year ended June, 30, 2012. The expenditures for "Communities Putting Prevention to Work – ARRA" of \$50,685 were not included in the schedule we were provided. In addition, we noted several errors in the CFDA #s and the actual fiscal 2012 federal expenditures for certain programs. Failure to properly update and maintain these records could result in the lack of compliance with federal regulations for reporting federal expenditures.

Recommendation:

We recommend that management review the requirements for preparing and maintaining an updated and accurate SEFA. In addition, the Organization should develop a policy requiring all Federal Award notification and grant documentation be maintained by the finance department and that the policy require at least quarterly review of all federally funded programs to ensure that current year activity agrees to activity posted in the accounting system. The finance department should also monitor, on a regular basis, the amount of expenditures in order to inform the necessary departments when funding is unavailable or exhausted.

Management's Response

Schedule of Expenditure of Federal Awards (SEFA) will be reviewed on a quarterly basis. This will ensure an accurate reporting on the schedule. Programs' statement of activities report to the Board and the managers, done on a monthly basis, will continue to emphasize the need to keep expenses in-line with revenues.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.**SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2012****B. FINDINGS – RELATED TO AUDIT OF FINANCIAL STATEMENTS (CONTINUED)****PRIOR AUDIT FINDINGS:****2011-1: SEGREGATION OF DUTIES**

One of the primary components of strong internal controls requires separation of incompatible duties. In essence, no one individual should be responsible for all aspects of a transaction or have total control over the financial activity and general ledger maintenance/reporting. Proper segregation is not always possible in a small organization, but limited segregation to the extent possible can and should be implemented to reduce the risk of errors or fraud.

During our review of the internal control policies and procedures practiced by the Organization's finance department, we noted that the Organization is lacking controls over the processing of accounts payable and the related disbursing of funds. The Chief Financial Officer's assistant is responsible for entering the vendor invoices into the general ledger system, processing checks for payment, and mailing out the payments. In addition the same individual has full access to the blank checks. Good internal control requires that no one person handle all elements of a single transaction.

Recommendation:

We recommend that the Organization establish and enforce adequate internal control policies and procedures to mitigate the risk of misuse of Organization's funds. The Chief Financial Officer should review all checks and initial the related source documents before the checks are mailed. In addition, we recommend that a control log of the check number sequence be maintained by the Chief Financial Officer to ensure that all checks are accounted for properly. Lastly, we recommend that the Chief Financial Officer review the prepared bank reconciliations along with the related bank statement and sign off on the reconciliation to indicate his review.

Status: Cleared during fiscal year ended June 30, 2012.

2011-2: CASH RECEIPTS

During our audit we noted that the Organization didn't maintain a list of cash received from the Child Care Program. In addition, our review of the Organization's internal controls policies and procedures indicated that there is a lack of segregation of duties in the receiving, depositing and recording of cash receipts. We noted that the Chief Financial Officer's assistant is responsible for all aspects of the cash receipts process, including receiving, depositing and recording of cash receipts. To ensure effective internal controls it is necessary to separate these duties.

Recommendation:

We recommend that a list of all cash receipts be maintained by the Finance Department. We further recommend that the Chief Financial Officer review and compare the list of cash receipts maintained by the Finance Department to the list maintained by the Child Care Program. Lastly, a list of all deposits should be compared to the monthly bank statement to ensure that all cash receipts were in fact deposited into the proper account.

Status: Cleared during fiscal year ended June 30, 2012.

(CONTINUED)

URBAN LEAGUE OF RHODE ISLAND, INC.**SCHEDULE OF FINDINGS AND QUESTIONED COSTS
YEAR ENDED JUNE 30, 2012**

B. FINDINGS -- RELATED TO AUDIT OF FINANCIAL STATEMENTS (CONTINUED)**PRIOR AUDIT FINDINGS (Continued):****2011-3: HELD CHECKS**

During our audit, we noted that the Organization cut a number of checks in the months of May 2011 and June 2011, but did not issue them until after August 2011. These checks were recorded as outstanding checks at June 30, 2011, resulting in understatement of cash and payables by approximately \$27,000.

Recommendation:

We recommend that the Organization establish adequate internal control policies and procedures to ensure that the checks are released within a reasonable period. Although invoices should be promptly entered into the accounts payable system, checks should not be prepared until the disbursement is ready to be made.

Status: Cleared during fiscal year ended June 30, 2012.

C. FINDINGS AND QUESTIONED COSTS RELATED TO AUDIT OF MAJOR FEDERAL AWARD PROGRAMS**CURRENT YEAR FINDINGS:**

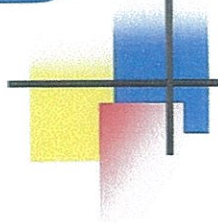
None noted.

PRIOR AUDIT FINDINGS

None noted.

(CONCLUDED)

URBAN LEAGUE OF R.I., INC



Monthly Board Financial Report for December 2013

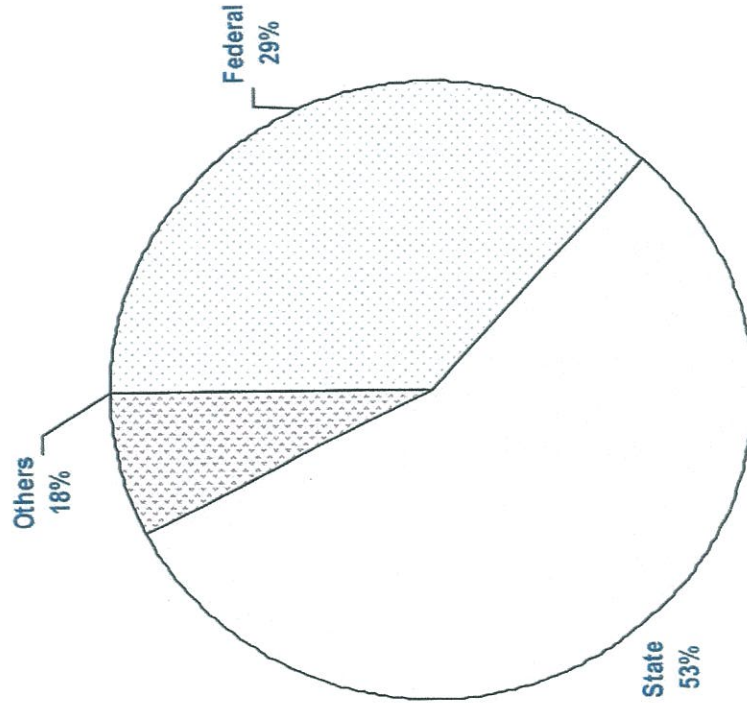
February 7, 2014

Table of contents

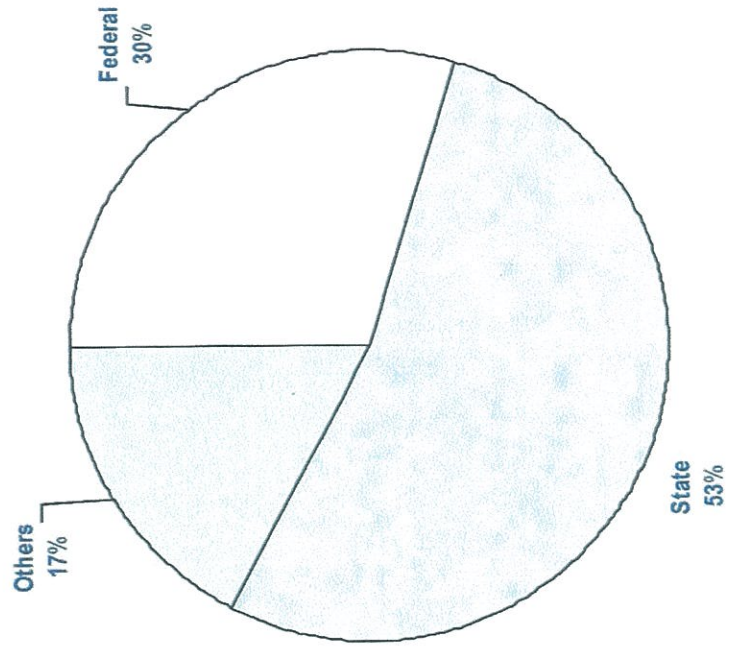
- Sources of Fund
- Uses of Funds Review
- Year to date Statement of Activities
- Statement of Financial Position for General Fund
- Statement of Financial Position for SPNC
- Cash Flow

Sources of Fund

Dec. 2013



Dec. 2012

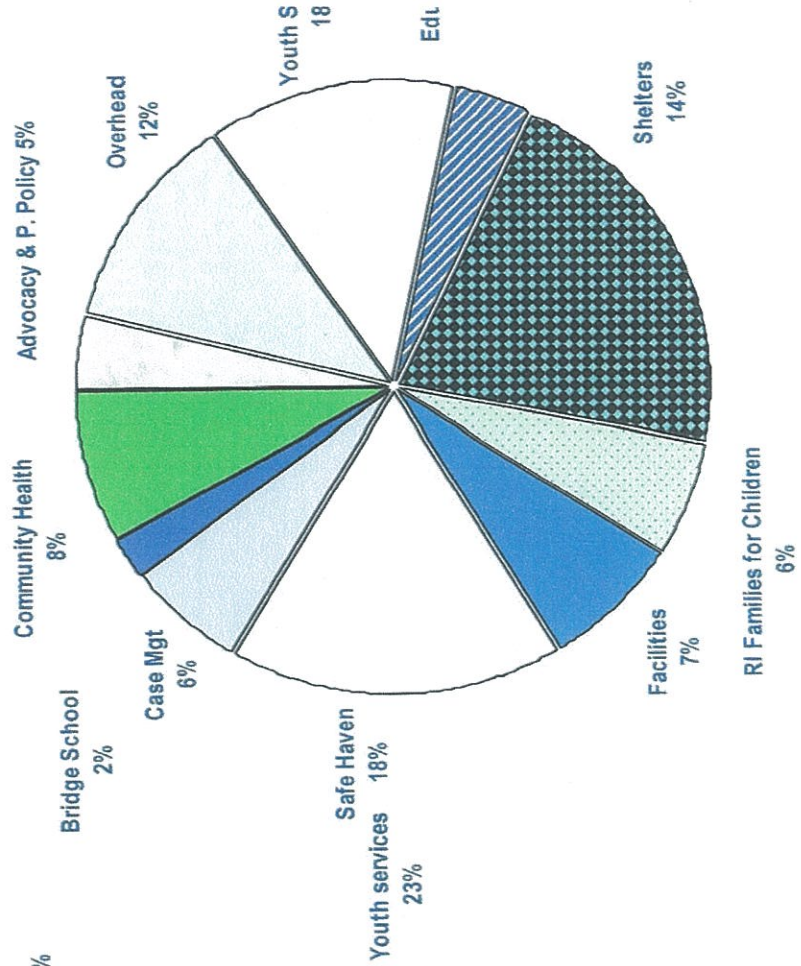
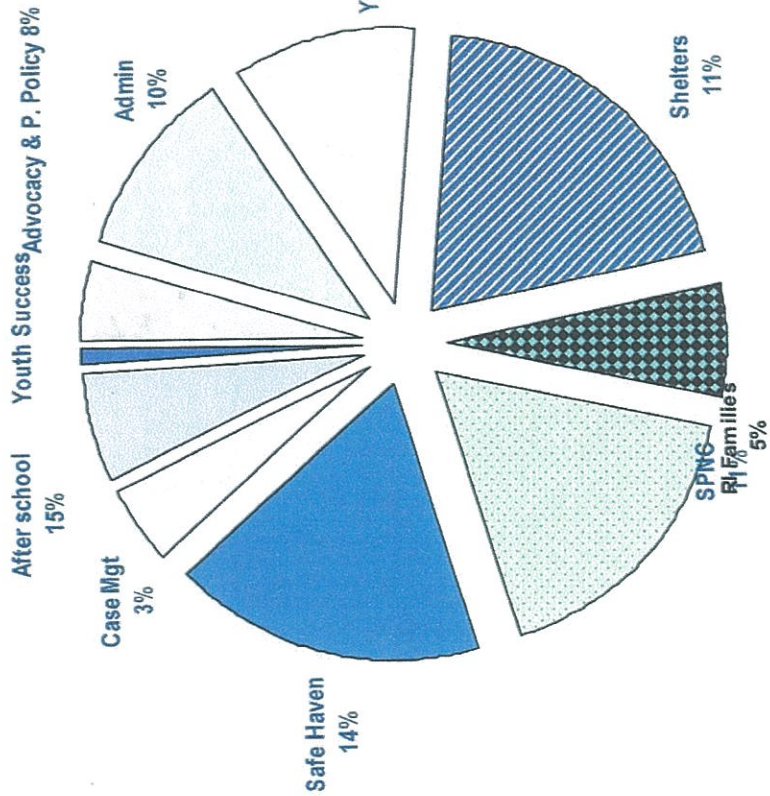


Uses of Funds

Total Actual expenditures of all units

Dec. 2013

Dec. 2012



STATEMENT OF ACTIVITIES

6 Months ended December 2013

PROGRAM	ANNUAL BUDGETED INCOME	YTD INCOME	YTD BALANCE	YTD % INCOME	ANNUAL BUDGETED EXPENSES	YTD EXPENSES	YTD BALANCE	YTD % Expenses
CASE MGT.	17,700.00	20,055.53	(2,355.53)	113.31%	17,700.00	29,137.49	(11,437.49)	164.62%
APP(Tobacco & Legislative Grant)	35,000.00	13,137.11	21,862.89	37.53%	35,000.00	17,177.21	17,822.79	49.08%
ADMINISTRATION	113,211.00	43,085.94	70,125.06	38.06%	113,211.00	70,948.51	42,262.49	62.67%
YOUTH SUCCESS	217,295.00	20,443.77	196,851.23	9.41%	217,295.00	4,544.70	212,750.30	2.09%
YOUTH SERVICES	167,250.00	58,706.00	108,544.00	35.10%	167,250.00	65,831.34	101,418.66	39.36%
SHELTERS	280,000.00	162,973.38	117,026.62	58.20%	280,000.00	129,281.83	150,718.17	46.17%
RI FAMILIES for CHILDREN	115,354.00	57,677.22	57,676.78	50.00%	115,354.00	42,378.37	72,975.63	36.74%
AFTER SCHOOL CARE	29,498.02	29,498.02	0.00	100.00%	29,498.02	40,381.00	(10,882.98)	136.89%
SAFE HAVENS	412,515.74	114,555.96	297,959.78	27.77%	412,515.74	111,353.26	301,162.48	26.99%
TOTAL GENERAL FUND	1,387,823.76	520,132.93	867,690.83	37.48%	1,387,823.76	511,033.71	876,790.05	36.82%
SPNC	25,000.00	13,675.29	11,324.71	54.70%	25,000.00	106,818.34	(81,818.34)	427.27%
TOTAL Budget	1,299,612.76							
Scholarship	16,000.00							
Total Agency Budget	1,315,612.76							

STATEMENT OF ACTIVITIES

6 Months ended December 2013

PROGRAM	BUDGET INCOME	YTD INCOME	VARIANCE	BUDGET EXPENSES	YTD EXPENSES	VARIANCE	P/L
CASE MGT.	8,850.00	20,581.53	(11,731.53)	8,850.00	29,137.49	(20,287.49)	(8,555.96)
APP	17,500.00	13,137.11	4,362.89	17,500.00	17,177.21	322.79	(4,040.10)
ADMINISTRATION	56,605.50	43,085.94	13,519.56	56,605.50	70,948.51	(14,343.01)	(27,862.57)
YOUTH SUCCESS	36,215.83	20,443.77	15,772.06	36,215.83	4,544.70	31,671.13	15,899.07
YOUTH SERVICES	90,000.00	58,706.00	31,294.00	90,000.00	65,831.34	24,168.66	(7,125.34)
SHELTERS	140,000.00	162,973.38	(22,973.38)	140,000.00	129,281.83	10,718.17	33,691.55
RI FAMILIES for CHILDREN	57,677.00	57,677.22	(0.22)	57,677.00	42,378.37	15,298.63	15,298.85
CHILD & AFTER SCHOOL C.	29,498.02	29,498.02	0.00	29,498.02	40,381.00	(10,882.98)	(10,882.98)
SAFE HAVENS	206,258.00	114,555.96	91,702.04	206,258.00	111,353.26	94,904.74	3,202.70
TOTAL GENERAL FUND	642,604.35	520,658.93	642,604.35	642,604.35	511,033.71	131,570.64	9,625.22
SPNC	12,500.00	13,675.29	(1,175.29)	12,500.00	106,818.34	(94,318.34)	(93,143.05)

URBAN LEAGUE OF R.I. GENERAL FUND
STATEMENT OF FINANCIAL POSITION
November 30, 2013

	CURRENT YEAR-14	PERCENT	PREVIOUS YEAR-13	PERCENT
Current Assets:				
Cash	(63,001.61)	-34.02%	(22,988.02)	-8.21%
Accounts & Contracts Receivable	181,692.87	98.11%	281,932.93	93.58%
Prepaid Expenses	8,889.38	4.80%	8,376.70	2.99%
Total Current Assets	127,580.62	68.89%	247,321.61	88.36%
Fixed Assets:				
Furnishing & Equipment	155,955.22	64.21%	151,679.22	54.19%
Computers	11,094.57	5.89%	16,189.76	5.43%
Shelter Furniture	15,988.16	8.62%	19,148.98	6.77%
Total Property & Equipment	183,017.95	98.82%	183,017.95	65.39%
Less Accumulated Depreciation	(183,017.95)	-98.82%	(183,017.95)	-65.39%
Net Property & Equipment	0.00	0.00%	0.00	0.00%
Other Assets:				
Due from SPNC	57,613.42	31.11%	32,576.93	11.64%
Total	185,194.04	100.00%	279,898.54	100.00%
LIABILITIES AND NET ASSETS				
Current Liabilities:				
Due to SPNC	686,278.00	245.19%	633,720.42	228.41%
Accounts Payable & Accrued Expenses	214,012.86	76.46%	210,695.10	75.28%
Notes Payable	394,000.00	140.77%	379,000.00	135.41%
City of Providence	45,000.00	16.08%	0.00	0.00%
Total Current Liabilities	1,339,290.86	478.49%	1,223,415.52	437.09%
Net Assets:				
Unrestricted(previous years)	(1,183,391.49)	-422.79%	(877,550.93)	-313.52%
Temporarily Restricted	0.00	0.00%	0.00	0.00%
Permanently Restricted (Revolving loan)	35,000.00	12.50%	35,000.00	12.50%
Increase (Decrease) in Net Assets	(1,148,391.49)	-410.29%	(842,550.93)	-301.02%
Total Net Assets	5,705.33	31.80%	100,966.05	-36.07%
Total Liabilities & Net Assets	(1,154,096.82)	-378.49%	(943,516.98)	-337.09%
Total	185,194.04	100.00%	279,898.54	100.00%

Current Yr-10 Previous Yr-09

Ratios Analysis

Current Ratio:

Current Assets	127,580.62	247,321.61
Current Liabilities	1,339,290.86	1,223,415.52
Working Capital	(1,211,710.24)	(976,083.91)
Current Ratio	0.10	0.20

Note: working capital and current ratio measures the ability to pay off short-term obligations

Debt Ratio (Leverage)

Total Debt	394,000.00	379,000.00
Total Asset	185,194.04	279,898.54
Debt Ratio	2.13	1.35

Receivables

Receivables analysis

current	31-60	61-90	Total
181,692.87	0.00	0.00	181,692.87
84.15%	0.00	10.85%	

SOUTH PROVIDENCE NEIGHBORHOOD CENTER
STATEMENT OF FINANCIAL POSITION
November 30, 2013

ASSETS

	CURRENT YEAR-14	PERCENT	PREVIOUS YEAR-13	PERCENT
Current Assets:				
Cash	(869.61)	-0.02%	151,422.36	3.20%
Accounts & Contracts Receivable	0.00	0.00%	0.00	0.00%
Allowance for Uncoll. Rent & Gas	0.00	0.00%	0.00	0.00%
Prepaid Expenses	0.00	0.00%	0.00	0.00%
Total Current Assets	(869.61)	-0.02%	151,422.36	3.20%
Fixed Assets:				
Construction in Progress	637,892.05	103.76%	557,988.05	93.20%
Furnishing & Equipment	86,222.07	1.44%	104,691.17	2.22%
Land	557,018.00	12.13%	496,685.70	10.51%
Improvements	1,027,931.68	22.35%	985,251.56	20.85%
Buildings	3,817,605.10	83.16%	3,877,304.05	82.04%
Computers & Copiers	47,591.13	1.04%	52,435.60	1.11%
Total Property & Equipment	6,204,260.03	120.16%	6,074,336.03	116.72%
Less Accumulated Depreciation	(2,275,427.59)	-49.55%	(2,098,129.04)	-44.39%
Net Property & Equipment	3,928,832.44	70.59%	3,976,206.99	72.32%
Other Assets:				
Due from General Fund	662,945.07	14.44%	598,697.11	12.67%
	4,590,907.90	100.00%	4,728,316.46	100.00%

LIABILITIES AND NET ASSETS

Current Liabilities:				
Accounts Payable & Accrued Expenses	86,390.62	1.40%	(102,872.22)	-2.18%
Mortgage/Note payable(Hamilton,Potter, Oxford,Slater)	391,682.90	8.29%	388,809.71	8.44%
Real Estate Taxes Payable	0.00	0.00%	0.00	0.00%
Total Current Liabilities	458,073.52	6.88%	285,937.49	10.61%
Net Assets:				
Operating (Unrestricted)	4,210,168.03	89.09%	4,339,470.36	91.82%
Temporarily Restricted	0.00	0.00%	0.00	0.00%
Permanently Restricted	0.00	0.00%	0.00	0.00%
Total Net Assets	4,210,168.03	89.09%	4,339,470.36	91.82%
Increase (Decrease) in Net Assets	(77,323.65)	-4.04%	90,908.61	-2.43%
	4,132,834.38	93.12%	4,430,378.97	89.39%
Total Net Assets	4,132,834.38	93.12%	4,430,378.97	89.39%
	4,560,907.90	100.00%	4,728,316.46	100.00%

Ratios Analysis

	Current Year-09	Previous Year-08
Currents Ratio:		
Currents Assets	-869.61	151,422.36
Current Liabilities	458,073.52	295,937.49
Working Capital	-458,943.13	-144,515.13
Current Ratio	0.00	0.51

Note: working capital and current ratio measure the ability to pay off short-term obligations.

Debt Ratio (leverage)

Total Assets	3,928,832.44	3,976,206.99
Total Debt	458,073.52	295,937.49
Debt Ratio	11.66%	7.44%

Receivables

Receivable analysis	current	31-60	61-90	Over 90
	0.00	0.00	0.00	5,982.23
	86.20%	0.00%	0.00%	13.80%

CASH FLOW

For Fiscal Year 2013-2014

	<u>Nov. 2013</u>	<u>Dec. 2013</u>
Cash on Hand	(63,450)	(63,875)
Cash Receipt	126,414	76,360
Total Cash Available	62,965	12,485
Cash Disbursed	126,839	65,140
Net Increase or Decrease	(63,875)	(52,655)
Current Borrowing	-0-	-0-
Borrowed to date	394,000	394,000
Cash Balance	(63,875)	(52,655)



Board of Directors

Robert A. DeRobbio, PhD
Chair

John H. McCray, Jr., PhD
1st Vice Chair

Lawrence E. Brown,
C.P.A.
Treasurer

Norman G. Orodener,
Esq.
Secretary

March 25, 2014

State of Rhode Island and Providence Plantations
Department of Education
Office of Charter Schools
Shepard Building
255 Westminster Street, Sixth Floor
Providence, Rhode Island 02903-3400

To Whom It May Concern:

Roseline O. Adesuyi

Marty Cooper

Judge Laureen D'Ambra

Robert B. Jacquard, Esq.

Glenn S. Prescod, MD, MPH

Anthony J. Regine, DDS

Khamden Soch

Reginald Thevenot

Norris Waldron

Vera Wilson

Richard J. Zienowicz, MD, FACS

On behalf of the Rhode Island Urban League, we are honored to serve as the fiduciary sponsor and establishing entity for Ida Lewis Leadership Academy, a proposed charter school, which if approved by the Rhode Island Department of Education, would open its doors in August 2015 to students residing in Newport County. Founded in 1939, the Rhode Island Urban League is a community-based non-profit tax-exempt organization whose mission is to eliminate racial segregation and discrimination. The Rhode Island Urban League's Board of Trustees and the founders of Ida Lewis Leadership Academy share the same passion of seeking equality for Blacks, other minorities and the economically disadvantaged. Both organizations are committed to enabling those who are traditionally underserved to demonstrate their full potential as productive community members and leaders who leave behind a legacy. We both believe in the importance of empowering community members to make a positive impact on the world.

Belinda L. Francis
Interim CEO

Having thoroughly reviewed the attached charter school proposal, we are confident that there is a clear philosophical alignment between the Rhode Island Urban League and the Ida Lewis Leadership Academy. We are thus proud to affiliate with Ida Lewis Leadership Academy and excited about our ongoing synergistic partnership.

*Affiliated with
The National*

Urban League

Respectfully Submitted,

Belinda Francis
Interim Executive Director
Rhode Island Urban League

Wendy Randle
Executive Director
Ida Lewis Leadership Academy

2015-2016

Ida Lewis Leadership Academy

August '15						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

3

September '15						
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27	28	29	30			

20

October '15						
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21

November '15						
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29	30					

16

December '15						
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13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

16

January '16						
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31						

19

February '16						
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21	22	23	24	25	26	27
28	29					

15

March '16						
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27	28	29	30	31		

21

April '16						
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23	24	25	26	27	28	29
30						

16

May '16						
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21	22	23	24	25	26	27
28	29	30	31			

20

June '16						
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5	6	7	8	9	10	11
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19	20	21	22	23	24	25
26	27	28	29	30		

13

July '16						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Aug 19	First Day of School
Sep 07	Labor Day - No School
Sep 11	Professional Development
Oct 12	Columbus Day - No School
Oct 23	Professional Development
Nov 03	Election Day - No School
Nov 11	Veteran's Day - No School
Nov 26	Thanksgiving
Nov 27	Thanksgiving Break
Dec 11	Parent/Teacher Conferences - No School
Dec 23	Beginning of Holiday Recess
Jan 01	End of Holiday Recess
Jan 08	Professional Development
Jan 18	MLK Day - No School
Feb 15	Beginning of Winter Recess
Feb 19	End of Winter Recess
Mar 18	Parent/Teacher Conferences - No School
Apr 01	Good Friday - No School
Apr 18	Beginning of Spring Recess
Apr 22	End of Spring Recess
May 30	Memorial Day - No School
Jun 21	Last Day of School

TRIMESTERS

Oct 09	Mid Trimester 1
Nov 25	End Trimester 1
Jan 22	Mid Trimester 2
Mar 11	End Trimester 2
May 06	Mid Trimester 3

STATE OF RHODE ISLAND CHARTER SCHOOL OPERATING BUDGET PROJECTIONS

Charter School:

Ida Lewis Leadership Academy

	FY2016	FY2017	FY2018	FY2019	FY2020
MAJOR ASSUMPTIONS					
A Average local aid per pupil	10,999.90	10,999.90	10,999.90	11,015.72	11,019.82
B Average state aid per pupil	3,791.69	3,791.69	3,791.69	3,791.69	3,791.69
C Student Enrollment	100	120	140	160	180
D Gross Square Footage (GSF) of facility	15,000	15,000	15,000	15,000	15,000
E <i>Staffing</i>					
E1. School Principals/Asst Principals	0.5	0.5	0.5	0.5	0.5
E2. School Support Staff	1.5	1.5	1.5	1.5	1.5
E3. Executive Director/Superintendent	0.5	0.5	0.5	0.5	0.5
E4. Deputies/Administrators	0.8	0.8	0.8	0.8	0.8
E5. Program/Operations Support Staff	0.0	0.0	0.0	0.0	0.0
E6. Teachers	10.0	11.0	12.0	13.0	14.0
E7. Paraprofessionals	4.0	4.0	5.0	5.0	5.0
E8. Pupil Support	1.0	1.0	1.0	1.0	1.0
E9. Teacher Support	0.0	0.0	0.0	0.0	0.0
E10. Program Management	1.0	1.0	1.0	1.0	1.0
E11. Special Services	0.0	0.0	0.0	0.0	0.0
E12. Facilities Maintenance	0.5	0.5	0.5	0.5	0.5
F Staff FTE	19.8	20.8	22.8	23.8	24.8
Subtotal:					
OPERATING REVENUES					
1 Local Revenue	1,099,990.00	1,319,988.00	1,539,986.00	1,762,515.00	1,983,568.00
2 State Revenue	379,168.79	455,002.54	530,836.30	606,670.06	682,503.82
3 Grants - Charter Schools Program	300,000.00	75,000.00	75,000.00	0.00	0.00
4 Grants - Private	100,000.00	200,000.00	250,000.00	300,000.00	350,000.00
5 Federal formula funds (inc. Title I, III and IDEA)	180,000.00	208,000.00	252,000.00	292,000.00	332,000.00
6 Capital Projects Funds	0.00	0.00	0.00	0.00	0.00
7 Other:	0.00	0.00	0.00	0.00	0.00
8 TOTAL OPERATING REVENUES	2,059,158.79	2,257,990.54	2,647,822.30	2,961,185.06	3,348,071.82

OPERATING EXPENDITURES**School Management**

9 Salaries: Principals and Assistant Principals

10 Salaries: Support Staff

11 School Office

12 Other:

Subtotal:

50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00
40,000.00	40,800.00	41,616.00	42,448.32	43,297.29	43,297.29
25,000.00	25,500.00	26,010.00	26,530.20	27,060.80	27,060.80
0.00	0.00	0.00	0.00	0.00	0.00
115,000.00	116,300.00	117,626.00	118,978.52	120,358.09	120,358.09

Program/Operations Management

14 Salaries: Executive Director or Superintendent

15 Salaries: Deputies and Administrators

16 Salaries: Support Staff

17 Legal

18 School Board

19 Business Operations

20 Information Management and Technology

21 Other:

Subtotal:

70,000.00	70,000.00	70,000.00	70,000.00	70,000.00	70,000.00
50,000.00	51,000.00	52,020.00	53,060.40	54,121.61	54,121.61
0.00	0.00	0.00	0.00	0.00	0.00
15,000.00	15,000.00	7,000.00	7,000.00	7,000.00	7,000.00
500.00	500.00	500.00	500.00	500.00	500.00
17,500.00	17,500.00	17,500.00	17,500.00	17,500.00	17,500.00
10,000.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00
0.00	0.00	0.00	0.00	0.00	0.00
163,000.00	164,000.00	157,020.00	158,060.40	159,121.61	159,121.61

Instruction

23 Salaries: Teachers

24 Salaries: Paraprofessionals

25 Stipends and Bonuses

26 Pupil-Use Technology, Hardware, and Software

27 Instructional Materials Supplies

28 Other:

Subtotal:

445,040.00	496,684.00	553,307.00	609,910.00	666,513.00	666,513.00
61,440.00	78,336.00	79,903.00	81,501.00	83,131.00	83,131.00
5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00
72,000.00	7,000.00	7,000.00	7,000.00	7,000.00	7,000.00
25,000.00	30,000.00	35,000.00	40,000.00	45,000.00	45,000.00
0.00	0.00	0.00	0.00	0.00	0.00
608,480.00	617,020.00	680,210.00	743,411.00	806,644.00	806,644.00

Instructional Support					
30	Salaries: Pupil Support	80,603.00	84,149.00	87,717.00	91,312.00
31	Salaries: Teacher Support	0.00	0.00	0.00	0.00
32	Salaries: Program Management	0.00	0.00	0.00	0.00
33	Salaries: Special Services	71,000.00	74,550.00	78,100.00	81,650.00
34	Guidance and Counseling	0.00	0.00	0.00	0.00
35	Library and Media	50,000.00	2,500.00	2,500.00	2,500.00
36	Extracurricular	10,000.00	12,000.00	14,000.00	16,000.00
37	Student Services, Outreach, Recruitment	20,000.00	20,000.00	20,000.00	20,000.00
38	Student Health Services	2,000.00	2,000.00	2,000.00	2,000.00
39	Academic Interventions	1,000.00	1,200.00	1,400.00	1,600.00
40	Curriculum Development	55,000.00	55,000.00	55,000.00	55,000.00
41	In Service, Staff Development, and Support	1,000.00	1,200.00	1,400.00	1,600.00
42	Assessment	5,000.00	1,000.00	1,000.00	1,000.00
43	Other:	0.00	0.00	0.00	0.00
44	Subtotal:	295,603.00	253,599.00	263,117.00	272,662.00
Operations					
45	Salaries: Facilities Maintenance	22,900.00	23,358.00	23,825.16	24,301.66
46	Transportation	105,282.00	105,282.00	105,282.00	105,282.00
47	Food Services	0.00	0.00	0.00	0.00
48	Safety	500.00	1,000.00	1,000.00	1,000.00
49	Building Upkeep and Maintenance	100,000.00	5,000.00	5,000.00	5,000.00
50	Maintenance Contracts	59,000.00	59,000.00	59,000.00	59,000.00
51	Utilities	23,000.00	23,000.00	23,000.00	23,000.00
52	Lease	108,000.00	108,000.00	108,000.00	108,000.00
53	Debt Service	0.00	0.00	0.00	0.00
54	Capital Projects	0.00	0.00	0.00	0.00
55	Other:	0.00	0.00	0.00	0.00
56	Subtotal:	418,682.00	324,640.00	325,107.16	325,583.66
Other Obligations					
57	Fringe Benefits	220,692.90	237,789.90	256,398.00	275,019.22
58	Insurance (non-employee)	20,000.00	20,000.00	20,000.00	20,000.00
59	Retiree Benefits	0.00	0.00	0.00	0.00
60	Purchased Management Services	0.00	0.00	0.00	0.00
61	Other:	0.00	0.00	0.00	0.00
62	Subtotal:	240,692.90	257,789.90	276,398.00	295,019.22
Community Services					
63	Community Service Operations	1,500.00	1,800.00	2,100.00	2,400.00
64	Other:	0.00	0.00	0.00	0.00
65	Subtotal:	1,500.00	1,800.00	2,100.00	2,400.00
66	Budgeted Contingencies	0.00	0.00	0.00	0.00
67	TOTAL OPERATING EXPENDITURES	1,842,957.90	1,735,148.90	1,821,578.16	1,916,114.80
68	SURPLUS/(DEFICIT)	216,200.89	522,841.64	826,244.14	1,045,070.26
					2,020,895.96
					1,327,175.85

Rhode Island Charter Public Schools:
Enrollment and Funding Estimates

Follow the instructions provided in the gray boxes. Add information only in the fields highlighted yellow.

Table 1: Total Enrollment Estimate

FY2016		FY2017		FY2018		FY2019		FY2020	
Name of Community	#	%	#	%	#	%	#	%	%
Jamestown	5	5%	6	5%	7	5%	8	5%	5%
Little Compton	5	5%	6	5%	7	5%	9	6%	6%
Middletown	25	25%	30	25%	35	25%	40	25%	25%
Newport	50	50%	60	50%	70	50%	80	50%	49%
Portsmouth	10	10%	12	10%	14	10%	15	9%	9%
Tiverton	5	5%	6	5%	7	5%	8	5%	5%
Total Enrollment	100	100%	120	100%	140	100%	160	100%	100%

Table 2: Enrollment Estimates of Students Receiving Free/Reduced Lunch

FY2016		FY2017		FY2018		FY2019		FY2020	
Name of Community	#	%	#	%	#	%	#	%	%
Jamestown	1	20%	1	17%	1	14%	2	25%	22%
Little Compton	1	20%	1	17%	2	29%	2	22%	18%
Middletown	12	48%	13	43%	17	49%	19	48%	51%
Newport	29	58%	35	58%	39	56%	46	58%	58%
Portsmouth	1	10%	1	8%	2	14%	2	13%	12%
Tiverton	1	20%	1	17%	2	29%	2	25%	22%
Total FRL Enrollment	45	45%	52	43%	63	45%	73	46%	46%

Table 3: Local Aid

Fill in the local per-pupil aid amounts by community from RIDE's published projections, which can be found at: <http://www.ride.ri.gov/FundingFinance/FundingSources/StateEducationAid.aspx>. The community names and enrollment percentages will auto-fill from Table 1. An average local per pupil will be calculated.

Name of Community	FY2016		FY2017		FY2018		FY2019		FY2020	
	\$	%	\$	%	\$	%	\$	%	\$	%
Jamestown	\$14,261	5%	\$14,261	5%	\$14,261	5%	\$14,261	5%	\$14,261	5%
Little Compton	\$12,623	5%	\$12,623	5%	\$12,623	5%	\$12,623	6%	\$12,623	6%
Middletown	\$9,315	25%	\$9,315	25%	\$9,315	25%	\$9,315	25%	\$9,315	25%
Newport	\$11,568	50%	\$11,568	50%	\$11,568	50%	\$11,568	50%	\$11,568	49%
Portsmouth	\$10,092	10%	\$10,092	10%	\$10,092	10%	\$10,092	9%	\$10,092	9%
Tiverton	\$10,675	5%	\$10,675	5%	\$10,675	5%	\$10,675	5%	\$10,675	5%
Average Local Per Pupil	\$11,000		\$11,000		\$11,000		\$11,016		\$11,020	
Total Local Aid	\$1,099,990		\$1,319,988		\$1,539,986		\$1,762,515		\$1,983,568	

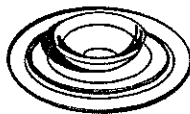
Table 4: State Aid

The state aid table will autopopulate with information from the "state aid info" sheet. The table will automatically calculate the state aid for each community, and generate an average per pupil amount.

Name of Community	FY 2016		FY 2017		FY 2018		FY 2019		FY 2020	
	Core Amount:	Core	SSF (0.4)	Share Ratio	# students	# FRL students	Total Core	Total SSF	Average PP	Total
Jamestown	8,897	8,897	3,559	6.0%	5	1	2,669	214	577	2,883
Little Compton	8,897	8,897	3,559	12.4%	5	1	5,516	441	1,191	5,957
Middletown	8,897	8,897	3,559	32.5%	25	12	72,288	13,879	3,447	86,167
Newport	8,897	8,897	3,559	46.7%	50	29	207,745	48,197	5,119	255,942
Portsmouth	8,897	8,897	3,559	13.0%	10	1	11,566	463	1,203	12,029
Tiverton	8,897	8,897	3,559	33.7%	5	1	14,991	1,199	3,238	16,191
Average and total					100	45			3,792	379,169

Table 5: Total Aid	FY2016		FY2017		FY2018		FY2019		FY2020	
	Total Local	Total State	Total Local	Total State	Total Local	Total State	Total Local	Total State	Total Local	Total State
	1,099,990	379,169	1,319,988	455,003	1,539,986	530,836	1,762,515	606,670	1,983,568	682,504
	1,479,159		1,774,991		2,070,822		2,369,185		2,666,072	

a little café



food & catering

Proposal from A Little Café for Wendy
Breakfast & Lunch Program

Breakfast \$2.00 per student

Breakfast will include orange juice and daily selection of breakfast

Lunch menu will be formatted into a monthly menu with one choice for the student body.

Each student will select the day(s) they are having breakfast and submit completed form with payment for the month.

Lunch \$4.00 per student .50 per carton of milk

Lunch will include fruit, low-fat chocolate or white milk

Lunch choices will include a salad with protein or sandwich on wheat bread with protein and hot lunch selection

Lunch menu will be in a one month cycle menu. Each student will select their choices for each day(s) of the month and submit payment with their completed form.

Milk only option

Milk will be available for students bringing a lunch from home. Each student will select day(s) they are having milk and submit payment with their completed form

Specialty Events and Fundraising:

Thanksgiving Luncheon, Grandparents Day, Mother's Day Luncheon and Father's Day Lunch




Menus will be created for each event on a separate form. Each student will submit completed form to include how many children and adults are attending along with payment. \$4.00 per child and \$6.00 per adult. The school may choose to increase price for fundraising purposed.

Extra-curricular food events will be agreed upon by both parties and a case by case basis.

SEPTEMBER Lunch Order for: _____

Student Name _____

Grade _____

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
Labor Day  No School	Pancakes w Sausage Salad with Turkey Ham Sandwich Ham Wrap Milk Only	Baked Penne, Meat Sauce Tossed Salad Salad with Tuna Cheese Quesadilla Milk Only	BBQ Pork Sandwich Rice & Veggie Salad with Three Cheeses Tuna Sandwich Tuna Wrap Milk Only	Baked Mac n Cheese w Chicken and Broccoli Salad with Turkey Ham Sandwich Ham Wrap Milk Only
9	10	11	12	13
American Chop Suey with Salad Salad with Three Cheeses Chicken Salad Sandwich Chicken Salad Wrap Milk Only	Cheese Pizza with Veggie Salad with Turkey Tuna Sandwich Tuna Wrap Milk Only	Oven Fried Chicken Sandwich Tots & Veggie Salad with Ham Turkey Sandwich Turkey Wrap Milk Only	Beef Tacos Rice Salad with Tuna Ham Sandwich Ham Wrap Milk Only	Chicken Parm Pasta & Salad Salad with Three Cheeses Tuna Sandwich Tuna Wrap Milk Only
16	17	18	19	20
Hot Dogs Pasta Salad Salad with Turkey Grilled Ham and Cheese Milk Only	Turkey Mashed & Veggie Salad with Tuna Turkey Sandwich Turkey Wrap Milk Only	Baked Penne with Chicken Tossed Salad Salad with Three Cheeses Tuna Sandwich Tuna Wrap Milk Only	Baked Ham Rice & Veggie Salad with Tuna Chicken Salad Sandwich Chicken Salad Wrap Milk Only	Professional Day  Noon Dismissal
23	24	25	26	27
Pepperoni or Cheese Pizza with Veggie Salad with Turkey Tuna Sandwich Tuna Wrap Milk Only	Meatball Grinder Salad Salad with Three Cheeses Turkey Sandwich Turkey Wrap Milk Only	Chicken Nuggets Rice and Veggie Salad with Ham Chicken Salad Sandwich Chicken Salad Wrap Milk Only	Baked Mac n Cheese Veggie Salad with Chicken Salad Ham Sandwich Ham Wrap Milk Only	Shepard's Pie Salad with Tuna Grilled Cheese Milk Only
30				
Professional Day  No School				

Please place circle the meals you'd like to order and complete totals below.

of Meals Ordered

x \$3.50 =

Cost per Meal

\$ Total for Meals

+ Milk Only @ .50/day

Total \$ Enclosed

Please return your order form by August 30th.

**Ida Lewis Leadership Academy
Petition of Interest**

Mission Statement: Ida Lewis Leadership Academy, a vibrant and diverse K-8 public charter school, empowers its scholars to unlock their potential as lifelong learners and unleash their greatness as leaders. In the spirit of Ida Lewis' life, we embrace the core values of compassion, courage, respect, and determination. Our rigorous, 21st Century curriculum, integrated with technology and experiential learning, fosters creativity, critical thinking, and collaboration. We are committed to educating the whole child and inspiring our scholars to be culturally competent, environmentally conscious global citizens who make a difference in the world.

Name	Address	# of Children
Audra Lalli	64 Broadway Newport, RI	0
Alicia C. Farrell	5 Peckham St Newport RI	1
Michael Falli	84 Tower St Portsmouth	3
My Chm	8A Woolsey Rd Middletown	0
Louis Egan	146 Broadway Apt 1 Newport	1
Brian Ring	1 Adelaide Ave Middletown	0
Mary Petello	102 Swinburne Ln Newport RI	0/1
Nadine CR	12A Lake Erie St Middletown	3
CHRISTIE WALKER	21 SHIELDS ST -	2
Jason Sheehan	525 Spring Street - Npt.	0
Kerri Renshaw	525 Spring St., Newport	0
Mary G Chilton	20 Madeline drive Newport	1
Deen Chilton	20 Madeline Drive, Newport	1
William Chm	20 Madeline Drive, Newport	

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Name	Address	# of Children
George Silvia	10 Crestview dr. Portsmouth RI	2
Cory Smith	717 W Main Rd	4
Zack Sears	118 Busher Dr	1
Chris Menger	232-5 Maple Ave	1
NIRUT SENG	143 THIRD ST	1
Tanya McCants	201 Park Holm Newport	1
LIAN LE	17 CONCORD DR MIDDLETOWN	1
BRIANA MCCANTS	94 Park Holm	0
TESHANA SEARS	151 PARK HOLM	0
Robin Yabrudy	30 Melrose Ave Farmington	0

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[illegible]

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Name	Address	# of Children
Anthony Moore	113 Carroll Ave Npt.	1
Victoria Gamble	63 Friendship / Apt 2 / NPT	1 (under 3)
Harry Whitin	5 SIMMONS ST #1 NPT	0
Tim Sousa	11 West Narragansett Ave NPT	2
Erica Vaschko	804 Thede Island	0
DEB D. SWARTZ	94 OUTFORT RD.	7
Jason Bailey	27 1/2 Edward St	2
JONATHAN SULLIVAN	34 HOWARD ST NEWPORT	2

(6093)